

**OPERATING DOCUMENTATION**

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Document #	<b>VITA - HDS – 0040</b>
Revision Date	2007/04/04
Version	Final 1.0
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**GENERAL**

Name	ServiceCenter® 6.x Service Desk Training Manual		
Description	The main function of ServiceCenter6.x® is incident management through the use of "tickets". The solution is applicable to all existing ServiceCenter6.x users, including Northrop Grumman employees working under contract with VITA, and all VITA system users. The new design of ServiceCenter6.x will help streamline the VITA incident management process through best practices use of ticket handling, as well as automating many current manual processes. Through automation, the advantage will be faster and overall process efficiency improvements. The new ServiceCenter6.x system will produce reports from a single database that provide a more comprehensive view of support needs and accomplishments. The ServiceCenter6.x database will contain incident and service request ticket data, details, and user information.		
Purpose	The purpose of this training manual is to train users on ServiceCenter® v.6.x functionality.		
Document Owner	VCCC Helpdesk	Owner Org	CSL

**VERSION HISTORY**

Version	Date	Author	Template	Change Summary
1.0	2006/12/14	Calvin Clark	VITA-TEMP-0002	Initial release.
1.1	2007/03/01	Calvin Clark	VITA-TEMP-0002	Update the Resolve, Close and Edit Contact process. Replaced CSLG with CSL and CESD with VCCC Helpdesk. Changed document number.
1.2	2007/03/22	Calvin Clark	VITA-TEMP-002	Replaced all references to Peregrine ServiceCenter 6.1 to ServiceCenter 6.x. Added CSA Notification Process, Tips to Remember and Images and Icons.
1.0	2007/04/04	Calvin Clark	VITA-TEMP-002	Document moved to Final version.



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## Overview

The main function of ServiceCenter6.x<sup>®</sup> is incident management through the use of ServiceCenter6.x “tickets”. The solution is applicable to all existing ServiceCenter6.x users, including Northrop Grumman employees working under contract with VITA, and all VITA system users. The new design of ServiceCenter6.x will help streamline the VITA incident management process through best practices use of ticket handling, as well as automating many current manual processes. Through automation, the advantage will be faster and overall process efficiency improvements. The new ServiceCenter6.x system will produce reports from a single database that provide a more comprehensive view of support needs and accomplishments. The ServiceCenter6.x database will contain incident and service request ticket data, details, and user information.

Utilizing Best Practice methods, ServiceCenter6.x<sup>®</sup> is a comprehensive and fully integrated IT service management tool that enables VITA to improve service levels, balance resources and control cost. ServiceCenter6.x<sup>®</sup> with embedded ITIL-based best practices quickly deploys consistent, integrated work processes across every part of the VITA organization.




## Purpose

The purpose of this training manual is to train users on ServiceCenter<sup>®</sup> v.6.x functionality. Through the information in this training manual you will see how to navigate and perform incident management tasks through the new version. You will become aware of the new features, added functionality, and incorporated enhancements as they relate to ServiceCenter<sup>®</sup> v.6.x.

ServiceCenter<sup>®</sup> v.6.1 has a Web client as well. Throughout the document we will show you the web screens if they are different from the client version.

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## Document Conventions

Document Conventions	<b>Bold</b>	Used for emphasis, commands, options, switches, and literal portions of syntax that must appear exactly as shown.
	<i>Italic</i>	Used for field names, file names, variables, and placeholders that represent the type of text required.
		Used for clarification and helpful hints.
		Used to alert the user of a potential problem or gives critical information.
		Used to designate the beginning of a set of step-by step instructions.
Sources of Help	<p>All questions, access requests, or problems associated with ServiceCenter6.x should be directed to the Vccc Service Desk at 1-866-637-8482 or 804-786-3932.</p> <p>CBT: <a href="http://www.vita.virginia.gov/itTrain/vcccCbt/vcccCbt.cfm">http://www.vita.virginia.gov/itTrain/vcccCbt/vcccCbt.cfm</a></p> <p>The Live site will be available on the Go Live Release date, see respective managers for release date.</p> <p>Access to Production (<b>Live</b>) site:  <a href="https://servicecenter.it.northropgrumman.com/sc">https://servicecenter.it.northropgrumman.com/sc</a></p>	

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## Lesson 1: Logging in to ServiceCenter6.x<sup>®</sup>

### Windows Client (**Only**)

1. To login to ServiceCenter<sup>®</sup> v.6.x launch ServiceCenter Windows Client.
2. Go to Start > Programs > ServiceCenter Client.



To place the ServiceCenter icon on your desktop for future use simply create a shortcut. To do this go to Start > Programs > ServiceCenter Client and right click on ServiceCenter Client. You will then be given various options. Click on Create Shortcut. You will then see a second ServiceCenter in the dropdown. Simply drag this to your desktop.

At this point you are now able to login.

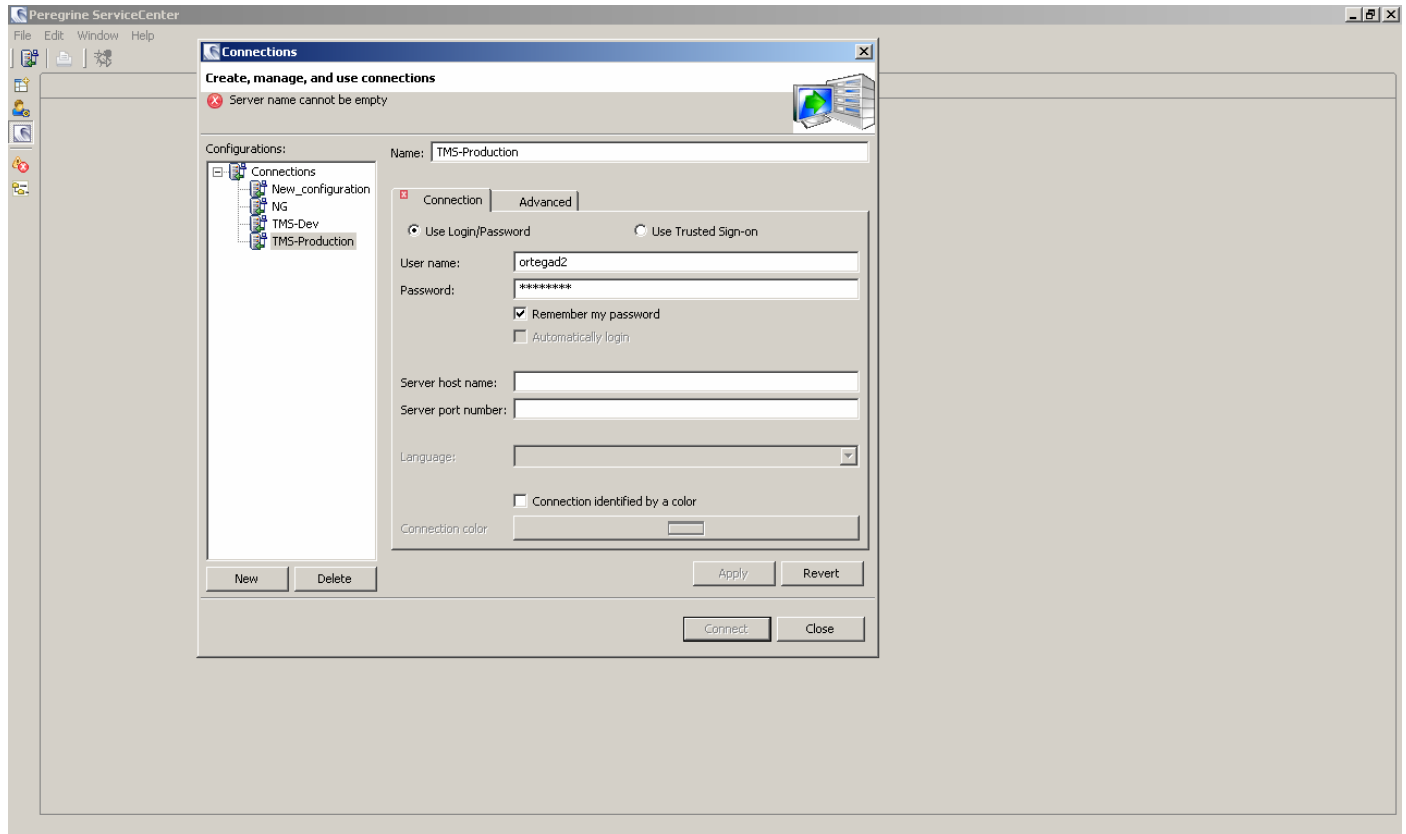
3. Click **File > Connect > Connections**.
4. Type your user name and password. The user name is based on your email profile setup by your system administrator.

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- Click **Connect** to log into ServiceCenter6.x®.



## Web Client

- To launch the Web client you will be given the URL for the production link prior to the Go Live date, the link below allows access to the developmental environment only.  
<https://servicecenter.it.northropgrumman.com/sc>
- Type your **complete** user name, (**email account**) and secure password. ([John.doe@vita.virginia.gov](mailto:John.doe@vita.virginia.gov)) The password length must be between 8-20 characters it allows, alpha, numeric, and special characters a minimum of one each. ServiceCenter keeps 13 passwords before allowing a repeat, each password must be reset every 90 days there is no minimum reset requirement.



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3. Click the **Login** button to authenticate.

ServiceCenter - Microsoft Internet Explorer provided by Northrop Grumman Corporation

File Edit View Favorites Tools Help

Back Forward Stop Home Search Favorites Refresh Print View Source

Address <http://63.175.65.29/sc/index.do> Go Links »

**Peregrine** SYSTEMS. Evolve Wisely™

Login

Navigator Login

Login:

Password:

Language: English

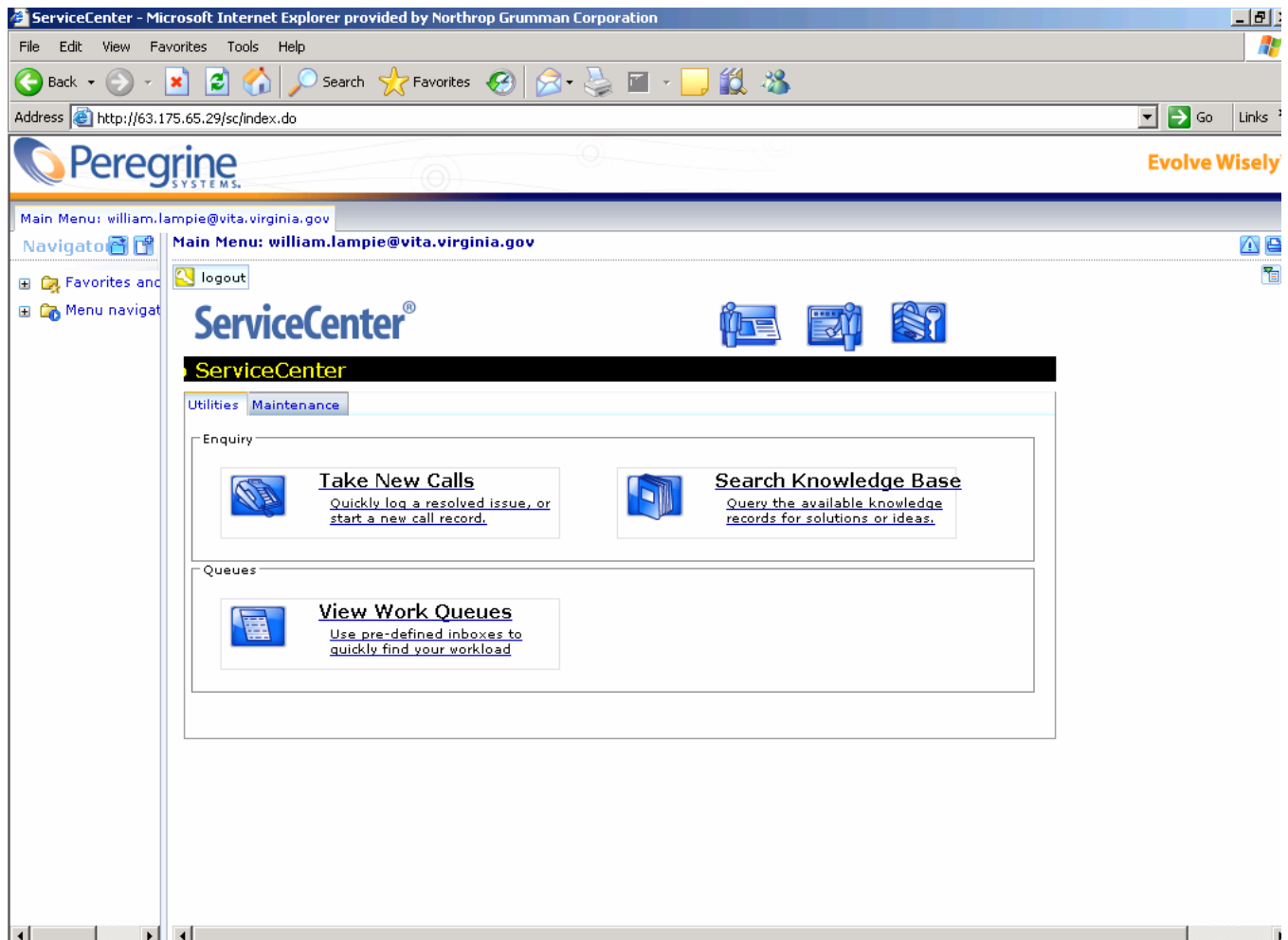
Login Cancel

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4. After successful authentication, the following screen will appear:



Note: The screen also contains tools for system navigation located to the left of the logout button.

**System Navigator** - The System Navigator is a navigational structure that can be expanded and collapsed to view ServiceCenter® menus, tables, fields, forms, and other integral components.

**Editor** – The editor utilizes menus and tabs for navigation similar to previous version of ServiceCenter®.

**Fast View** - Fast views are stored on the shortcut bar (the list of icons on the far left of the screen). When you create a fast view, the view minimizes to the shortcut bar where you can access it when you click its shortcut bar icon. Note: Windows client only.



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**Perspective** – Perspective is a new feature that allows an end-user to customize one or more views to provide all of the data and tools needed to complete a ServiceCenter® task. ServiceCenter® has a default perspective that is standard for accessing ServiceCenter® forms and data. Note: Windows client only.

There are six major activities surrounding a Call or Incident ticket. Those activities are:

- Opening a Call or Incident ticket
- Searching / querying tickets
- Updating tickets
- Suspending Incident tickets
- Resolving Incident tickets
- Closing Incident tickets

**Tips to remember:**

1. Always remember to look for the correct **system generated message** after you update a process.
2. Read each screen to ensure that you are in the correct Location, **Incident Queue** vs. **Call Queue**.
3. Always **Resolve** the ticket before you **Close** the ticket.
4. When searching for a ticket enter the ticket number if known, select a ticket status of **Open, Closed, or Either**, if unknown.
5. To change the status to **Suspend** or **Un-Suspend**, click the Details icon at the far top right of page
6. For the Helpdesk Analyst the CSA follows the same process as the normal ticket process. After the Incident has been saved you must click the **Notification tab to input the CSA information**.
7. When the term (ticket) is used in this document it may refer to a **Call** or **Incident** ticket.

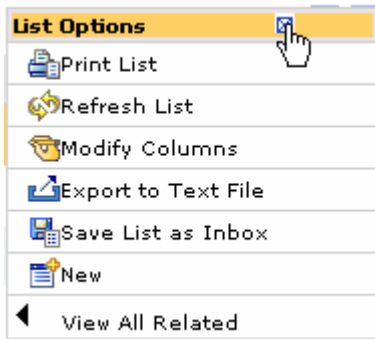
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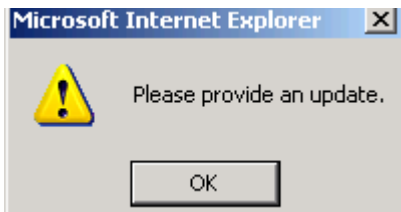
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## Images and Icons:

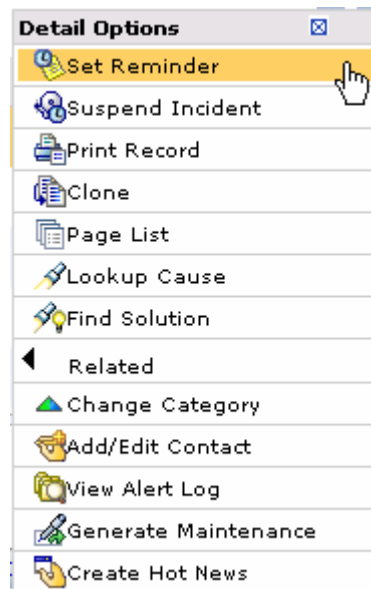
### List Options



### Reminder to provide Journal update



### Detail Options



Click print icon below to print a single ticket.



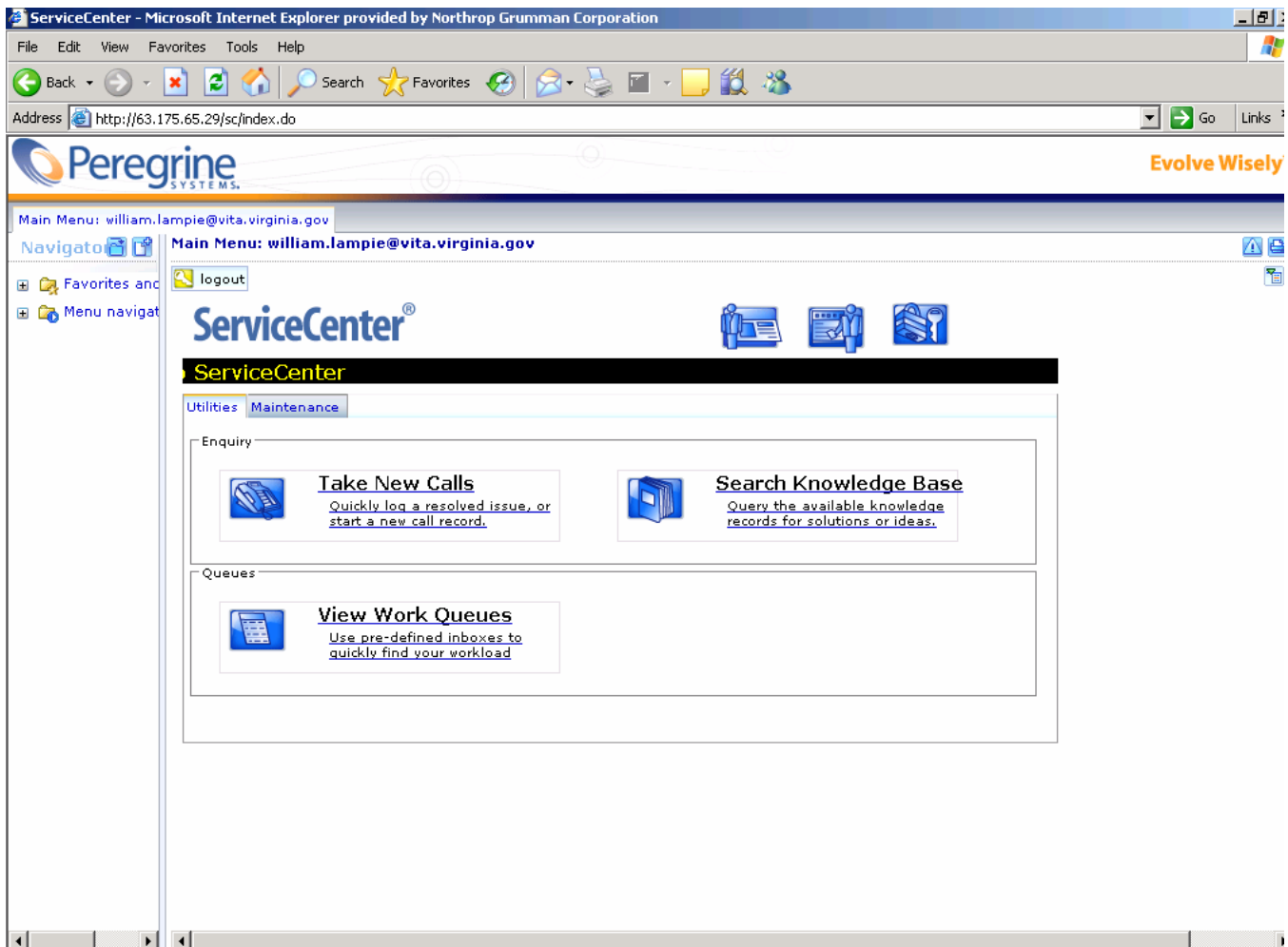
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## Lesson 2: Opening a Call Ticket

1. Click the **Take New Calls** icon located on the ServiceCenter editor.



The screen shown on the next page will appear:

Note: The **red triangle** in the top left corner of any text box represents mandatory data. Use the **Fill Form** tab located at the right corner of each text box.

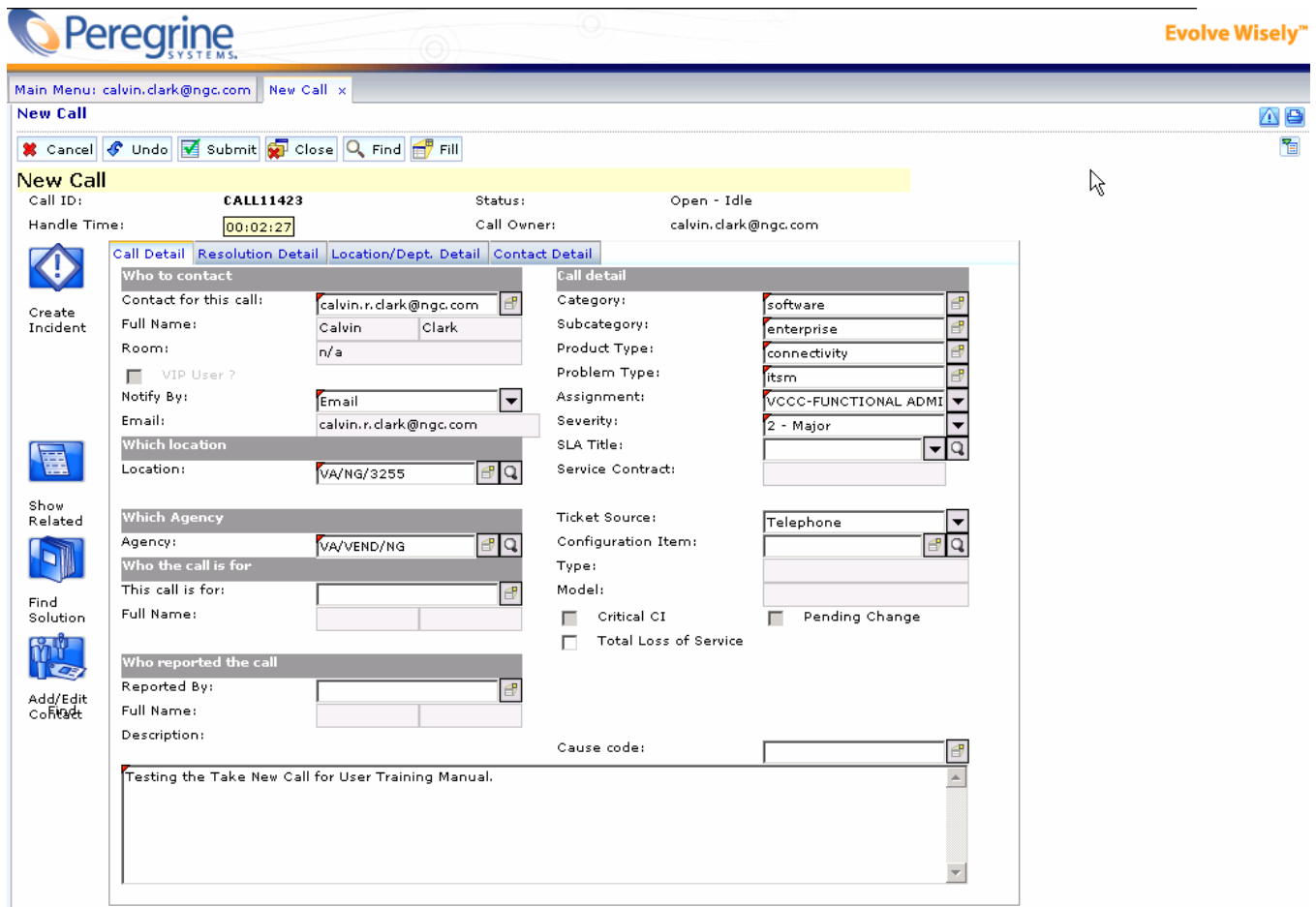
2. Fill out the appropriate information in the **Call Detail tab**. The *Contact, Location, Agency, Call Detail and Description* are mandatory. To enter the required data, use the **Fill Form** tab located at the right corner of each text box.

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- The Contact Name is associated with the email account ([john.doe@vita.virginia.gov](mailto:john.doe@vita.virginia.gov)). To filter your search you may begin with the first name, (john), to filter even further (john.d), after entering the Caller Name field, click on the fill form icon located to the right of the text box. You must make your selection from the list of names provided by your search.
- If there is only one name associated with the contact information the form fill will auto populate the caller's information.
- Click the **Submit** button when the mandatory information has been filled in. A message at the top of screen will indicate that the Call has been added.



Main Menu: calvin.clark@ngc.com New Call x

**New Call**

Call ID: CALL11423 Status: Open - Idle  
 Handle Time: 00:02:27 Call Owner: calvin.clark@ngc.com

**Who to contact**  
 Contact for this call: calvin.r.clark@ngc.com  
 Full Name: Calvin Clark  
 Room: n/a  
 VIP User?  
 Notify By: Email  
 Email: calvin.r.clark@ngc.com

**Which location**  
 Location: VA/NG/3255

**Which Agency**  
 Agency: VA/VEND/NG

**Who the call is for**  
 This call is for:  
 Full Name:  
 Description:

**Who reported the call**  
 Reported By:  
 Full Name:  
 Description:

**Call detail**  
 Category: software  
 Subcategory: enterprise  
 Product Type: connectivity  
 Problem Type: itsm  
 Assignment: VCCC-FUNCTIONAL ADMI  
 Severity: 2 - Major  
 SLA Title:  
 Service Contract:  
 Ticket Source: Telephone  
 Configuration Item:  
 Type:  
 Model:  
 Critical CI  
 Pending Change  
 Total Loss of Service  
 Cause code:

Testing the Take New Call for User Training Manual.

- The Call Ticket is now saved in an **Open-Idle Status**.
- To locate the new ticket you will have to search in the **Call Queue**.

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ServiceCenter - Microsoft Internet Explorer provided by Northrop Grumman Corporation

File Edit View Favorites Tools Help

Back Forward Stop Home Search Favorites

Address http://63.175.65.29/sc/index.do Go Links

Peregrine SYSTEMS. Evolve Wisely™

Main Menu: william.lampie@vita.virginia.gov Call: CALL10134 x

Navigator Favorites and Dashboard Menu navigation

Call: CALL10134

OK Cancel Clone Save Undo Close Find Fill Clocks

Call ID	Status	Unassigned	Contact Name
CALL10134	Open - Idle	false	a.cargill@virginiadot.org

Call: CALL10134

Call ID: CALL10134 Status: Open - Idle  
Call Owner: william.lampie@vita.virginia.gov

Call Detail Activities Resolution Detail Required Actions Related Records History Attachment

Who to contact

Contact for this call: a.cargill@virginiadot.org

Full Name: Alphonsa Cargill

Room: N/A

☐ VIP User ?

Notify By: Email

Email: a.cargill@virginiadot.org

Which location

Location: VA/VDOT/541

Address: 1700 North Main Street

Suffolk VA 23434

UNITED STATES

Which Agency

Agency: VA/STO/VDOT

Who the call is for

This call is for: a.cargill@virginiadot.org

Full Name: Alphonsa Cargill

Call detail

Category: access

Subcategory: remote access

Product Type: vpn

Problem Type: connectivity

Assignment: NET-FIREWALL-SUPPT

Severity: 3 - Medium

SLA Title:

Service Contract:

Ticket Source: Telephone

Configuration Item:

Type:

Model:

☐ Critical CI ☐ Pending Change

☐ Total Loss of Service

### NOTE

It is important to provide as much information as possible throughout the lifecycle of the ticket.

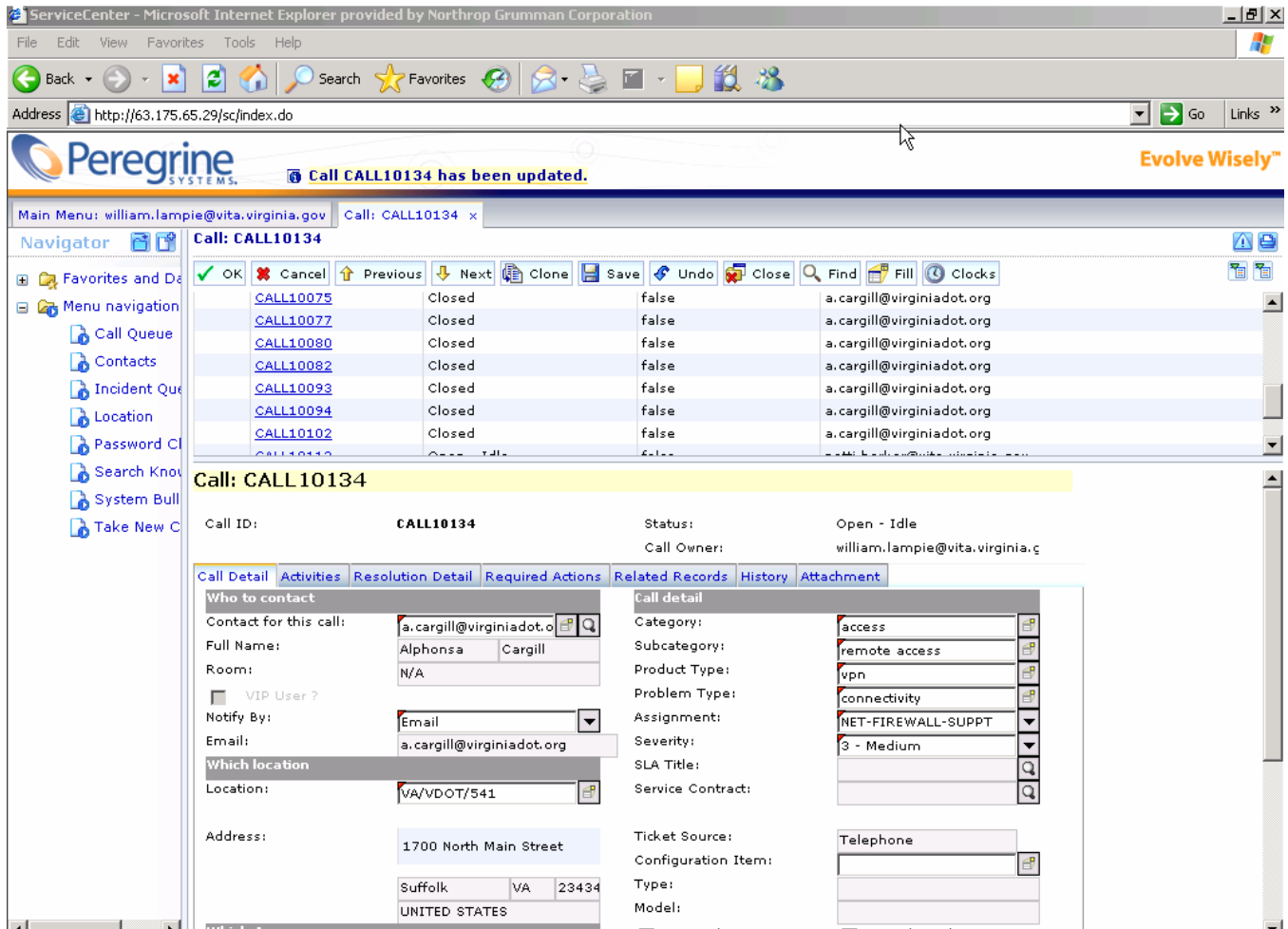
Each individual update may be found by first clicking the **Activities** tab then clicking the **Historic Activities** or **Journal Update** tabs.

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8. A system message will be displayed at the top of the page indicating the Call has been updated.



The screenshot shows the ServiceCenter web application in Microsoft Internet Explorer. The address bar displays <http://63.175.65.29/sc/index.do>. The page header includes the Peregrine Systems logo and the slogan "Evolve Wisely™". A system message at the top states: "Call CALL10134 has been updated." The main menu shows the user is logged in as [william.lampie@vita.virginia.gov](mailto:william.lampie@vita.virginia.gov). The left sidebar contains a "Navigator" with links to Favorites and Desktop, Menu navigation, Call Queue, Contacts, Incident Queue, Location, Password Change, Search Knowledge, System Bulletin, and Take New Call. The main content area displays a list of calls with columns for status, date, and email. The call **CALL10134** is highlighted. Below the list, the details for **Call: CALL10134** are shown, including the Call ID, Status (Open - Idle), Call Owner ([william.lampie@vita.virginia.gov](mailto:william.lampie@vita.virginia.gov)), and various fields for contact information, location, and call details.

Call ID	Status	Date	Email
<a href="#">CALL10075</a>	Closed	4/4/2007 10:00 AM	<a href="mailto:a.cargill@virginiadot.org">a.cargill@virginiadot.org</a>
<a href="#">CALL10077</a>	Closed	4/4/2007 10:00 AM	<a href="mailto:a.cargill@virginiadot.org">a.cargill@virginiadot.org</a>
<a href="#">CALL10080</a>	Closed	4/4/2007 10:00 AM	<a href="mailto:a.cargill@virginiadot.org">a.cargill@virginiadot.org</a>
<a href="#">CALL10082</a>	Closed	4/4/2007 10:00 AM	<a href="mailto:a.cargill@virginiadot.org">a.cargill@virginiadot.org</a>
<a href="#">CALL10093</a>	Closed	4/4/2007 10:00 AM	<a href="mailto:a.cargill@virginiadot.org">a.cargill@virginiadot.org</a>
<a href="#">CALL10094</a>	Closed	4/4/2007 10:00 AM	<a href="mailto:a.cargill@virginiadot.org">a.cargill@virginiadot.org</a>
<a href="#">CALL10102</a>	Closed	4/4/2007 10:00 AM	<a href="mailto:a.cargill@virginiadot.org">a.cargill@virginiadot.org</a>
<a href="#">CALL10110</a>	Closed	4/4/2007 10:00 AM	<a href="mailto:a.cargill@virginiadot.org">a.cargill@virginiadot.org</a>

**Call: CALL10134**

Call ID: **CALL10134** Status: Open - Idle  
Call Owner: [william.lampie@vita.virginia.gov](mailto:william.lampie@vita.virginia.gov)

**Call Detail** | Activities | Resolution Detail | Required Actions | Related Records | History | Attachment

**Who to contact**  
Contact for this call: [a.cargill@virginiadot.org](mailto:a.cargill@virginiadot.org)  
Full Name: Alphonsa Cargill  
Room: N/A  
VIP User? ☐  
Notify By: Email  
Email: [a.cargill@virginiadot.org](mailto:a.cargill@virginiadot.org)

**Which location**  
Location: VA/VDOT/541  
Address: 1700 North Main Street  
Suffolk VA 23434  
UNITED STATES

**Call detail**  
Category: access  
Subcategory: remote access  
Product Type: vpn  
Problem Type: connectivity  
Assignment: NET-FIREWALL-SUPPT  
Severity: 3 - Medium  
SLA Title:  
Service Contract:  
Ticket Source: Telephone  
Configuration Item:  
Type:  
Model:

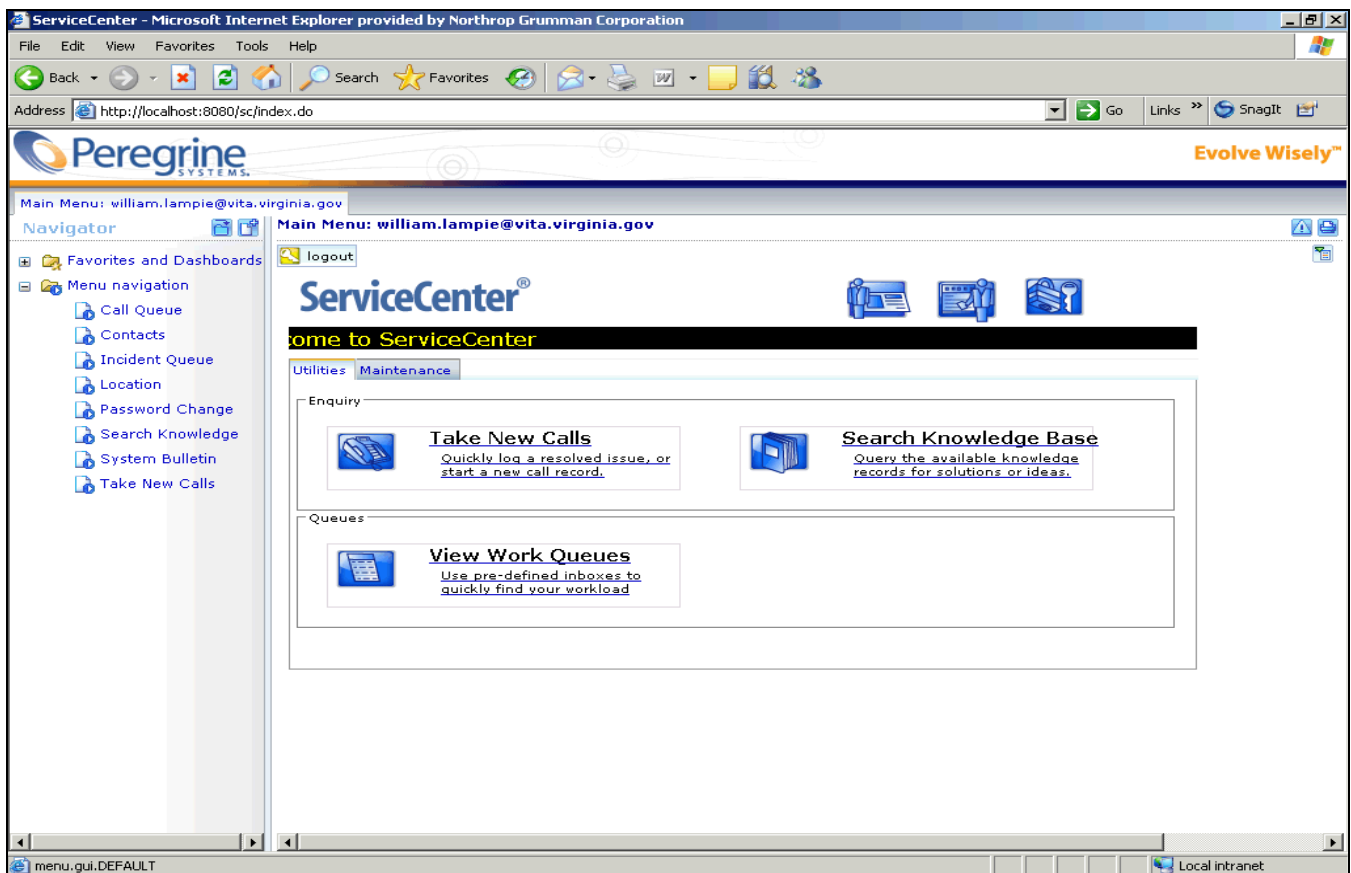
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## Lesson 3: Searching/Querying an Incident Ticket

1. To begin a basic search, click on the **View Work Queues** icon located on the ServiceCenter editor to find the ticket.



Note: You are now in the **Incident Queue**.





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3. If the ticket number is available enter it into the text box and click search. If you **do not** have the ticket number click the search button.

Note: Enter the prefix **IM** it must be in **Capital letters**, you may also enter the numbers only.

The screenshot shows a web browser window with the address bar displaying <https://63.175.65.29/sc/index.do>. The browser's address bar also shows a search bar with the text "Google" and a "Search" button. The browser's status bar shows "1 blocked" and "Check" buttons. The web application is titled "Peregrine SYSTEMS" and "Evolve Wisely™". The main menu shows "calvin.clark@ngc.com" and "Display Which Incident Tickets? x". The page title is "Display Which Incident Tickets?". The search interface includes a "Basic Incident Search" tab, a "Search for Incident Tickets Where:" section, and a "Number:" input field. The search criteria are organized into two columns. The left column includes fields for Company, Alert Level, Category, Subcategory, Product Type, Problem Type, SLA, Contact Name, Contact Location, Alternate Name, Manufacturer, Class, Cost Center, and Configuration Item. The right column includes fields for Smart Search?, Contract, Status, Owned By, Primary Asgn Group, Assignee Name, Severity, User Priority, Problem Management Candidate, SDU's unable to fix, and Total Loss of Service. The "Assigned As:" section has radio buttons for Primary, Secondary, and Either. The "Fix that is:" section has radio buttons for Permanent, Temporary, and Either. The "Tickets that are:" section has radio buttons for Open, Closed, and Either.

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4. The basic search by incident, **IM10007** or **10007**, see the highlighted gold bar on the next page.



Evolve Wisely™

Main Menu: calvin.clark@ngc.com Update Incident Number IM10097 x

**Update Incident Number IM10097**

OK Cancel Previous Next Save Undo Close Find Fill Clocks

Incident ID	Open Time	Update Time	Status	Category	Brief Description	Opened By	Primary Assignment
<b>IM10097</b>	<b>11/21/06 15:09:30</b>	<b>11/28/06 15:10:19</b>	<b>DEADLINE ALERT</b>	<b>network</b>	<b>Customer cannot login from home using VPN.</b>	<b>wayne.williams@vita.virginia.gov</b>	<b>NET-ENG-SUPPT-0</b>
IM10102	11/22/06 09:33:26	11/29/06 09:34:15	DEADLINE ALERT	software	word document is locked under Crystal Johnston account	william.lampie@vita.virginia.gov	DGS-DESKTOP TEAM
IM10106	11/22/06 10:12:10	11/29/06 10:12:17	DEADLINE ALERT	hardware	Request have laptop configured for remote VDEM dial up access.	keith.collier@vita.virginia.gov	DEU-DESKTOP VITA CENTRAL
IM10107	11/22/06 10:31:17	11/29/06 10:31:18	DEADLINE ALERT	telecomms	My blackberry is not working (the sensor for the scroll knob is not being read). Any chance I can pick up a new one today?	keith.collier@vita.virginia.gov	DEU-DESKTOP VITA CENTRAL

**IM10097** Ticket Status: Open

Incident Title: Customer cannot login from home using VPN.

Incident Details Company Specific Information Activities Contact Asset Attachment SLA History Alerts Related Records Billing Information

**Notification**

Alert Status:	DEADLINE ALERT	Owner:	wayne.williams@vita.virginia.gov
Category:	network	Primary Asgn Group:	NET-ENG-SUPPT-0
Subcategory:	lan	Assignee Name:	
Product Type:	lan connectivity	Second Asgn Group:	
Problem Type:	rpb	<input type="checkbox"/> Hot Ticket:	<input type="checkbox"/> Total Loss of Service:
Manufacturer:	Unknown	Severity:	3 - Normal
Class:		User Priority:	Medium
Contact Time:		Cause Code:	
Contract:		Site:	
Company:	VA	Ticket Source:	Email
Contact:	calvin.r.clark@ngc.com	Phone / extension:	8047867339

Incident Description:

Customer cannot login from home using VPN.

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5. The Advanced Search is optional, click the **Advanced Search** tab, to use dates as a search criteria enter the dates. Open After: 11/21/06 and before: 12/12/06 **click search** again.

Note: There are additional search filters in the *Advanced search tab and IR Query*.

[illegible]

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Note: The screen below is the result of your search; notice the **Open Time** column below.

The screenshot shows a web browser window displaying the Peregrine Systems application. The top navigation bar includes a main menu with the user 'calvin.clark@ngc.com' and a link to 'Update Incident Number IM10097'. Below this is a table of incidents with columns for Incident ID, Open Time, Update Time, Status, Category, Brief Description, Opened By, and Primary Assignment. Incident IM10097 is highlighted, showing it is a 'network' category incident with a 'DEADLINE ALERT' status, opened by 'wayne.williams@vita.virginia.gov'. Below the table, the detailed view for incident IM10097 is shown, including fields for Incident Title, Alert Status, Category, Subcategory, Product Type, Problem Type, Manufacturer, Class, Contact Time, Owner, Primary Assign Group, Assignee Name, Second Assign Group, Hot Ticket, Total Loss of Service, Severity, User Priority, Cause Code, Site, Ticket Source, and Phone / extension.

Incident ID	Open Time	Update Time	Status	Category	Brief Description	Opened By	Primary Assignment
IM10097	11/21/06 15:09:30	11/28/06 15:10:19	DEADLINE ALERT	network	Customer cannot logon from home using VPN.	wayne.williams@vita.virginia.gov	NET-ENG-SUPPT-0
IM10102	11/22/06 09:33:26	11/29/06 09:34:15	DEADLINE ALERT	software	word document is locked under Crystal Johnston account	william.lampie@vita.virginia.gov	DGS-DESKTOP TEAM
IM10106	11/22/06 10:12:10	11/29/06 10:12:17	DEADLINE ALERT	hardware	Request have laptop configured for remote VDEM dial up access.	keith.collier@vita.virginia.gov	DEU-DESKTOP VITA CENTRAL
IM10107	11/22/06 10:31:17	10/31:18	DEADLINE ALERT	telecomms	My blackberry is not working (the sensor for the scroll knob is not being read). Any chance I can pick up a new one today?	keith.collier@vita.virginia.gov	DEU-DESKTOP VITA CENTRAL

**IM10097** Ticket Status: Open

Incident Title: Customer cannot logon from home using VPN.

Incident Details | Company Specific Information | Activities | Contact | Asset | Attachment | SLA | History | Alerts | Related Records | Billing Information

Notification

Alert Status: DEADLINE ALERT

Category: network

Subcategory: lan

Product Type: lan connectivity

Problem Type: rpb

Manufacturer: Unknown

Class:

Contact Time:

Owner: wayne.williams@vita.virginia.gov

Primary Asgn Group: NET-ENG-SUPPT-0

Assignee Name:

Second Asgn Group:

Hot Ticket: ☐

Total Loss of Service: ☐

Severity: 3 - Normal

User Priority: Medium

Cause Code:

Site:

Ticket Source: Email

Phone / extension: 8047867339

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## Lesson 4: Updating an Incident Ticket

1. To update an Incident you must first search for the Incident number.
2. Next click the **Activities** tab, below the Activities tab click the **Action/Resolution** tab.
3. Select the **Type**; use the drop down arrow, next fill in the **Corrective Actions** edit box.
4. Click the **Save** button.

ServiceCenter - Microsoft Internet Explorer provided by Northrop Grumman Corporation

File Edit View Favorites Tools Help

Back Forward Stop Home Search Favorites Refresh Print View Source

Address http://63.175.65.29/sc/index.do Go Links

Peregrine SYSTEMS. Evolve Wisely™

Main Menu: william.lampie@vita.virginia.gov Update Incident Number IM10019 x

Update Incident Number IM10019

OK Cancel Previous Next Save Undo Close Find Fill Clocks

Incident ID	Open Time	Update Time	Alert Status	Category	Brief Description
PM0004	10/02/06 06:52:17	10/02/06 06:56:12	updated	hardware	This is in incident created in DEV iteration 1 - MSP Mode
IM10001	10/15/06 13:07:48	10/18/06 13:46:43	alert stage 1	hardware	Refresh this old blackberry
IM10020	10/23/06 16:26:54	10/23/06 16:43:30	alert stage 1	network	Lan/Wan outage
IM10022	10/23/06 16:33:21	10/23/06 16:48:30	alert stage 1	hardware	Open New Incident from problem/request
IM10021	10/23/06 16:29:33	10/23/06 16:45:30	alert stage 1	mainframe	new incident test using submit function
IM10023	10/23/06 16:39:45	10/23/06 16:55:30	alert stage 1	mainframe	Create Initial New Incident
IM10008	10/16/06 16:54:25	11/01/06 10:54:31	DEADLINE ALERT	access	Testing the New Call to New Incident Function
IM10019	10/20/06 13:37:56	10/20/06 13:53:20	alert stage 1	access	Problem with VPN access

**IM10019** Ticket Status: Open

Incident Title: Problem with VPN access

Incident Details Company Specific Information Activities Contact Asset Attachment SLA History Alerts Related Records Billing Information

Notification

Action / Resolution Site Visit Journal Updates Historic Activities

Corrective Actions: Type: Analysis/Research ☐ SDU unable to fix

TEST UPDATE FOR INCIDENT TICKET, CC@NGC

Solution: ☐ Candidate for Knowledge DB? Resolution Code:

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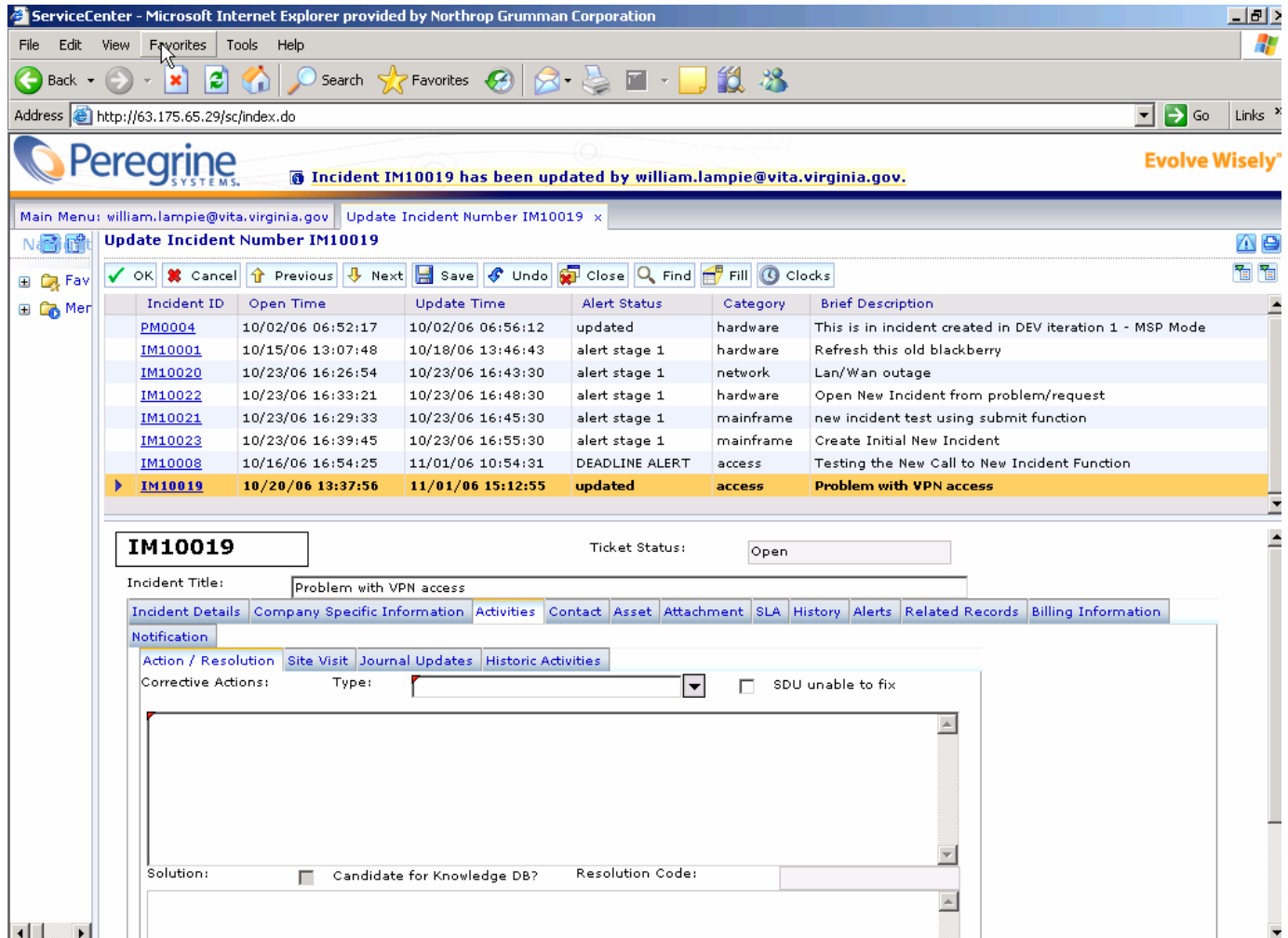
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- A system message will display at the top of the page indicating the incident has been updated. The saved data can be found by clicking the **Historic Activities**.



ServiceCenter - Microsoft Internet Explorer provided by Northrop Grumman Corporation

Address: http://63.175.65.29/sc/index.do

**Peregrine SYSTEMS** Incident IM10019 has been updated by william.lampie@vita.virginia.gov. Evolve Wisely™

Main Menu: william.lampie@vita.virginia.gov Update Incident Number IM10019 x

**Update Incident Number IM10019**

Incident ID	Open Time	Update Time	Alert Status	Category	Brief Description
PM0004	10/02/06 06:52:17	10/02/06 06:56:12	updated	hardware	This is in incident created in DEV iteration 1 - MSP Mode
IM10001	10/15/06 13:07:48	10/18/06 13:46:43	alert stage 1	hardware	Refresh this old blackberry
IM10020	10/23/06 16:26:54	10/23/06 16:43:30	alert stage 1	network	Lan/Wan outage
IM10022	10/23/06 16:33:21	10/23/06 16:48:30	alert stage 1	hardware	Open New Incident from problem/request
IM10021	10/23/06 16:29:33	10/23/06 16:45:30	alert stage 1	mainframe	new incident test using submit function
IM10023	10/23/06 16:39:45	10/23/06 16:55:30	alert stage 1	mainframe	Create Initial New Incident
IM10008	10/16/06 16:54:25	11/01/06 10:54:31	DEADLINE ALERT	access	Testing the New Call to New Incident Function
<b>IM10019</b>	<b>10/20/06 13:37:56</b>	<b>11/01/06 15:12:55</b>	<b>updated</b>	<b>access</b>	<b>Problem with VPN access</b>

**IM10019** Ticket Status: Open

Incident Title: Problem with VPN access

Incident Details | Company Specific Information | **Activities** | Contact | Asset | Attachment | SLA | History | Alerts | Related Records | Billing Information

Notification

Action / Resolution | Site Visit | Journal Updates | **Historic Activities**

Corrective Actions: Type:  ☐ SDU unable to fix

Solution: ☐ Candidate for Knowledge DB? Resolution Code:

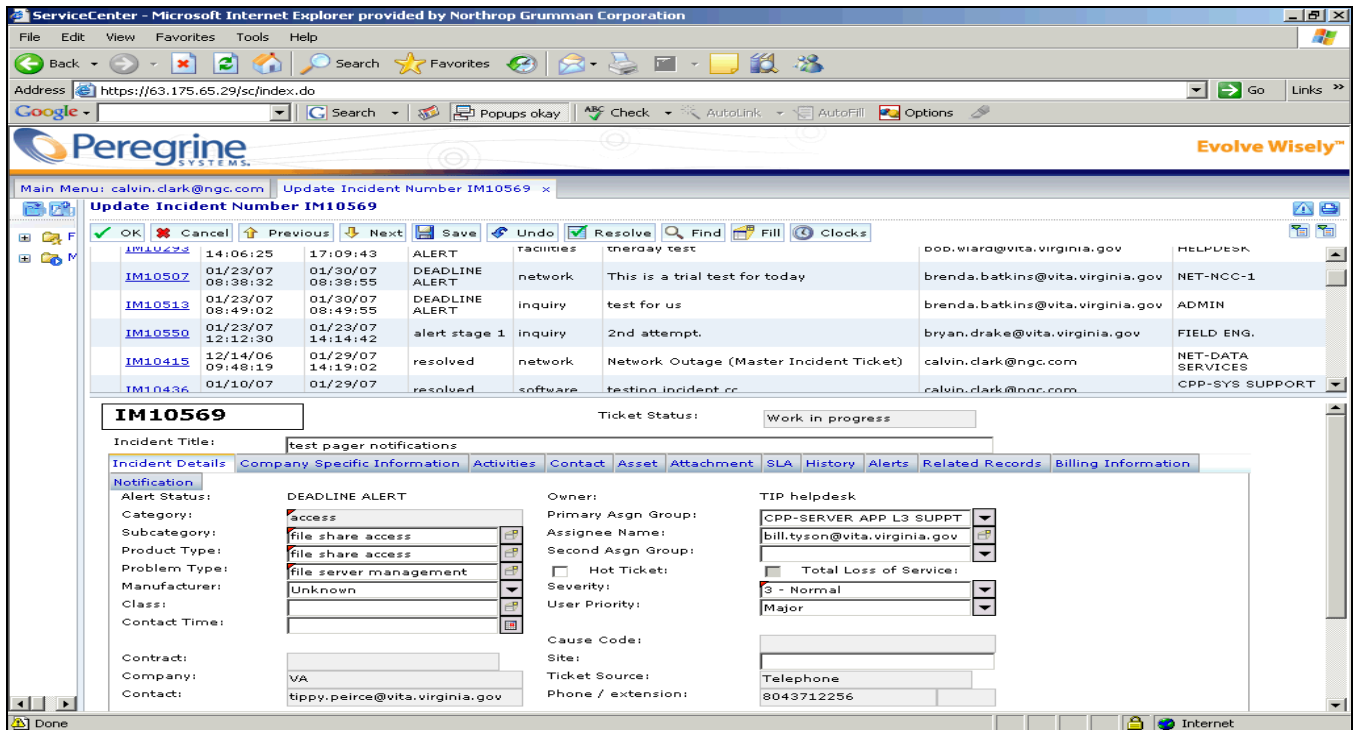
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## Lesson 5: Resolving an Incident Ticket

1. To locate the Incident that you would like to resolve, search the Incident Queue.



The screenshot shows the ServiceCenter web application in Microsoft Internet Explorer. The browser address bar displays the URL: https://63.175.65.29/sc/index.do. The application header includes the Peregrine Systems logo and the tagline "Evolve Wisely™". The main menu shows the user is logged in as calvin.clark@ngc.com. The "Update Incident Number IM10569" tab is active.

The Incident Queue table lists several incidents:

Incident Number	Alert Status	Category	Product Type	Problem Type	Manufacturer	Class	Contact Time	Owner	Primary Asgn Group	Assignee Name	Second Asgn Group	Hot Ticket	Severity	User Priority	Cause Code	Site	Ticket Source	Phone / extension
IM10569	ALERT	access	file share access	file server management	Unknown			test pager notifications	CPP-SERVER APP L3 SUPPT	bill.tyson@vita.virginia.gov			3 - Normal	Major			Telephone	8043712256

The details for Incident IM10569 are shown below the queue. The incident title is "test pager notifications". The status is "Work in progress". The notification is "DEADLINE ALERT". The category is "access". The product type is "file share access". The problem type is "file server management". The manufacturer is "Unknown". The class is "Unknown". The contact time is "09:48:19". The owner is "TIP helpdesk". The primary assign group is "CPP-SERVER APP L3 SUPPT". The assignee name is "bill.tyson@vita.virginia.gov". The second assign group is "CPP-SERVER APP L3 SUPPT". The hot ticket checkbox is unchecked. The severity is "3 - Normal". The user priority is "Major". The cause code is "CPP-SERVER APP L3 SUPPT". The site is "VA". The ticket source is "Telephone". The phone / extension is "8043712256".

2. Click the **Resolved** button.



3. Click the **Action/Resolution** tab to continue the resolve process.

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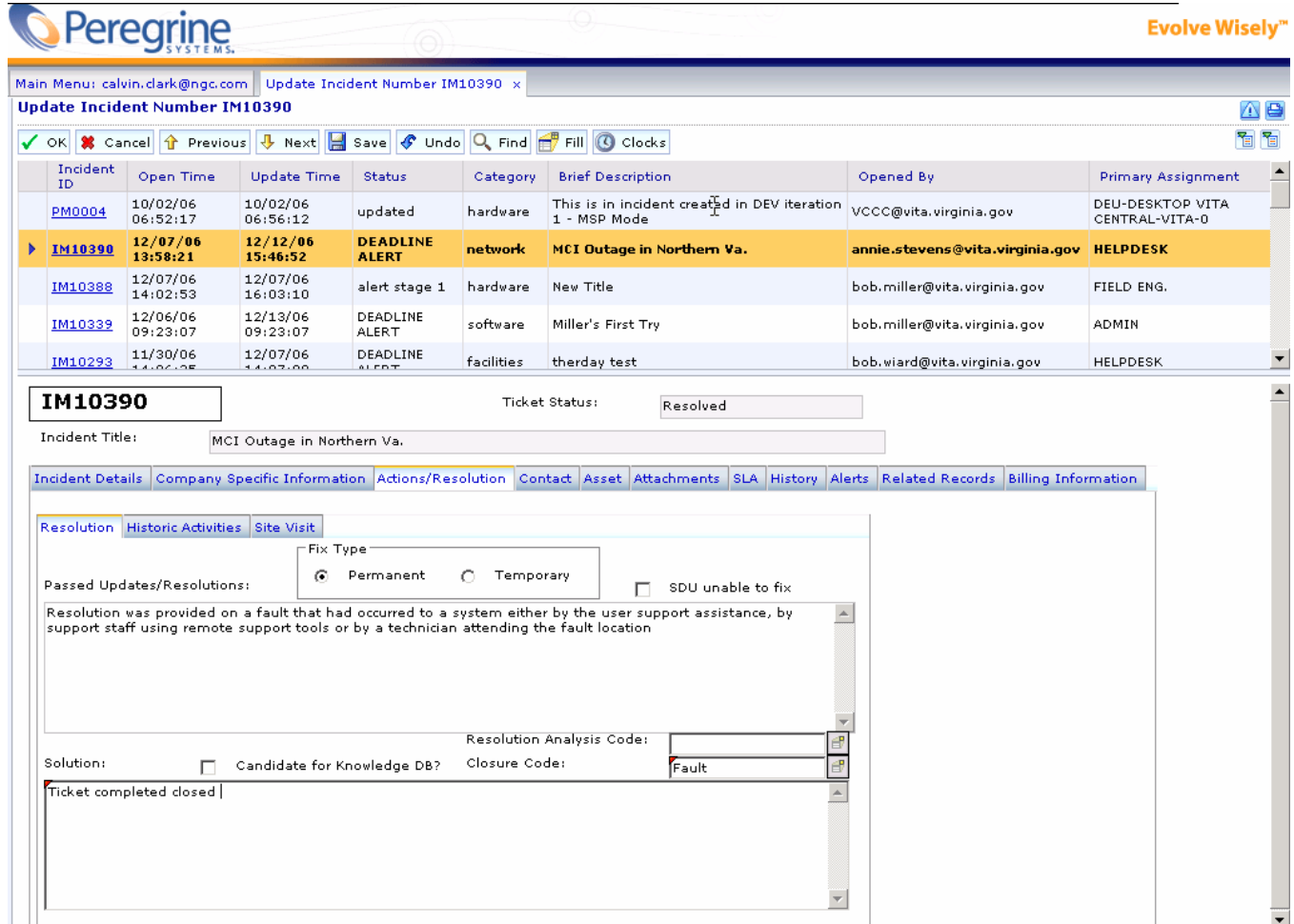
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4. Select the **Fix Type** and **Closure Code**, next fill in the **Solution** text box.



**Peregrine SYSTEMS** Evolve Wisely™

Main Menu: calvin.clark@ngc.com Update Incident Number IM10390 x

**Update Incident Number IM10390**

OK Cancel Previous Next Save Undo Find Fill Clocks

Incident ID	Open Time	Update Time	Status	Category	Brief Description	Opened By	Primary Assignment
PM0004	10/02/06 06:52:17	10/02/06 06:56:12	updated	hardware	This is in incident created in DEV iteration 1 - MSP Mode	VCCC@vita.virginia.gov	DEU-DESKTOP VITA CENTRAL-VITA-0
<b>IM10390</b>	<b>12/07/06 13:58:21</b>	<b>12/12/06 15:46:52</b>	<b>DEADLINE ALERT</b>	<b>network</b>	<b>MCI Outage in Northern Va.</b>	<b>annie.stevens@vita.virginia.gov</b>	<b>HELPDESK</b>
IM10388	12/07/06 14:02:53	12/07/06 16:03:10	alert stage 1	hardware	New Title	bob.miller@vita.virginia.gov	FIELD ENG.
IM10339	12/06/06 09:23:07	12/13/06 09:23:07	DEADLINE ALERT	software	Miller's First Try	bob.miller@vita.virginia.gov	ADMIN
IM10293	11/30/06 14:00:00	12/07/06 14:00:00	DEADLINE ALERT	facilities	therday test	bob.wiard@vita.virginia.gov	HELPDESK

**IM10390** Ticket Status: Resolved

Incident Title: MCI Outage in Northern Va.

Incident Details Company Specific Information Actions/Resolution Contact Asset Attachments SLA History Alerts Related Records Billing Information

Resolution Historic Activities Site Visit

Fix Type  
☒ Permanent ☐ Temporary ☐ SDU unable to fix

Passed Updates/Resolutions:  
 Resolution was provided on a fault that had occurred to a system either by the user support assistance, by support staff using remote support tools or by a technician attending the fault location

Resolution Analysis Code:

Solution: ☐ Candidate for Knowledge DB? Closure Code: Fault

Ticket completed closed

5. Click **Save**, (the ticket status will change to **Resolved**).
6. You may check the Historical Activities tab to ensure the ticket has been updated.

Date/Time	Type	Operator	Description
<a href="#">12/12/06 16:41:37</a>	Resolved	calvin.clark@ngc.com	Work completed TICKET IS RESOLVED.






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7. A system message will display at the top of the page indicating the incident was **resolved**. The system will also send out a notification message.



Incident IM11748 was Resolved.

Evolve Wisely™

Main Menu: calvin.clark@ngc.comUpdate Incident Number IM11748 x

Update Incident Number IM11748

OKCancelPreviousNextReopenSaveUndoCloseFindFillClocks

IM10621	02/07/07 13:45:03	02/07/07 15:51:23	1	telecomms	request price	calvin.clark@ngc.com	CONSOLE
IM10621	02/07/07 14:03:10	02/07/07 14:03:10	open	network	user unable to logon/connect to network	calvin.clark@ngc.com	NET-ENG-SUPPT-0
IM10627	02/07/07 16:28:12	02/07/07 18:28:23	alert stage 1	telecomms	Needs a new phone.	calvin.clark@ngc.com	VOS-VOICE-VITA INTERNAL SR
IM11726	02/13/07 14:51:16	02/13/07 16:51:45	1	telecomms	Creating a new call relating it to a new incident Clark.c	calvin.clark@ngc.com	TCS-SERVICE REQST CONSOLE
IM11728	02/13/07 14:57:32	02/13/07 17:37:45	3	access	acf2 password reset	calvin.clark@ngc.com	CCC-HELPDESK PROF
IM11748	02/14/07 13:45:03	02/14/07 13:37:26	resolved	telecomms	ServiceCenter Resolve Incident Ticket	calvin.clark@ngc.com	TCS-SERVICE REQST CONSOLE

IM11748

Ticket Status: Resolved

Incident Title: ServiceCenter Resolve Incident Ticket

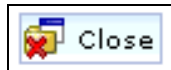
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## Lesson 6: Closing an Incident Ticket

1. Locate the Incident that you would like to close, search the Incident Queue.
2. In the **Action/Resolution** tab, enter a **Solution** in the edit text box.
3. Click the **Close** button.



**Peregrine SYSTEMS**

Main Menu: calvin.clark@ngc.com Update Incident Number IM11748 x

**Update Incident Number IM11748**

OK Cancel Previous Next Reopen Save Undo Close Find Fill Clocks

Incident Number	Time	Status	Category	Subject	Assigned To	Queue
IM11728	02/13/07 14:57:32	1	access	incident Clark.c	calvin.clark@ngc.com	CONSOLE
IM11748	02/14/07 13:15:23	resolved	telecomms	ServiceCenter Resolve Incident Ticket	calvin.clark@ngc.com	TCS-SERVICE REQST CONSOLE
IM10208	11/29/06 09:31:16	DEADLINE ALERT	mainframe	3rd test try peregrine class	carmen.jacobs@vita.virginia.gov	HELPDESK
IM10604	02/06/07 09:16:51	resolved	telecomms	T1 Pricing	carol.haygood@vita.virginia.gov	TCS-SERVICE REQST CONSOLE

**IM11748** Ticket Status: Resolved

Incident Title: ServiceCenter Resolve Incident Ticket

Incident Details Company Specific Information Actions/Resolution Contact Asset Attachments SLA History Alerts Related Records Billing Information

Resolution Historic Activities Site Visit

Fix Type: ☒ Permanent ☐ Temporary ☐ SDU unable to fix

Passed Updates/Resolutions:

02/14/07 13:27:36 (calvin.clark@ngc.com):  
Incident Resolved User service back to normal range.  
Reported problem had been caused by accidental damage or inappropriate use of a system

Solution: ☐ Candidate for Knowledge DB? Resolution Analysis Code: Closure Code: Fault

Incident Ticket Closed service restored 2/14/07

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4. A system message will display at the top of the page indicating the incident has been **Closed**.

**Incident IM11748 has been closed by calvin.clark@ngc.com.**

Evolve Wisely™

Main Menu: calvin.clark@ngc.com Update Incident Number IM11748 x

**Update Incident Number IM11748**

OK Cancel Previous Next Reopen Save Undo Find Fill Clocks

Incident ID	Open Time	Update Time	Status	Category	Brief Description	Opened By	Primary Assignment
<a href="#">IM10569</a>	01/24/07 15:03:03	02/06/07 15:26:23	resolved	access	test pager notifications	TIP helpdesk	CPP-SERVER APP L3 SUPPT
<a href="#">IM10609</a>	02/06/07 12:47:44	02/14/07 13:52:09	resolved	access	Test	VA HELPDESK TEST 3	CCC-HELPDESK ALERT N1
<a href="#">IM10630</a>	02/08/07 09:21:44	02/08/07 11:22:26	alert stage 1	facilities	Test call.	VA HELPDESK TEST 3	VOS-DIRECTORY ASSISTANCE
<a href="#">IM10631</a>	02/08/07 09:23:35	02/08/07 11:24:26	alert stage 1	facilities	Test	VA HELPDESK TEST 3	VENDOR PRODUCT AND SERVICE ISSUES

**IM11748** Ticket Status: Closed

Incident Title: ServiceCenter Resolve Incident Ticket

Incident Details Company Specific Information Actions/Resolution Contact Asset Attachments SLA History Alerts Related Records Billing Information

Resolution Historic Activities Site Visit

Fix Type  
☒ Permanent ☐ Temporary ☐ SDU unable to fix

Passed Updates/Resolutions:  
02/14/07 14:04:00 (calvin.clark@ngc.com):  
Incident Ticket Closed service restored 2/14/07  
02/14/07 13:27:36 (calvin.clark@ngc.com):  
Incident Resolved User service back to normal range.  
Reported problem had been caused by accidental damage or inappropriate use of a system

Resolution Analysis Code: Closure Code: Fault

Solution: ☐ Candidate for Knowledge DB?

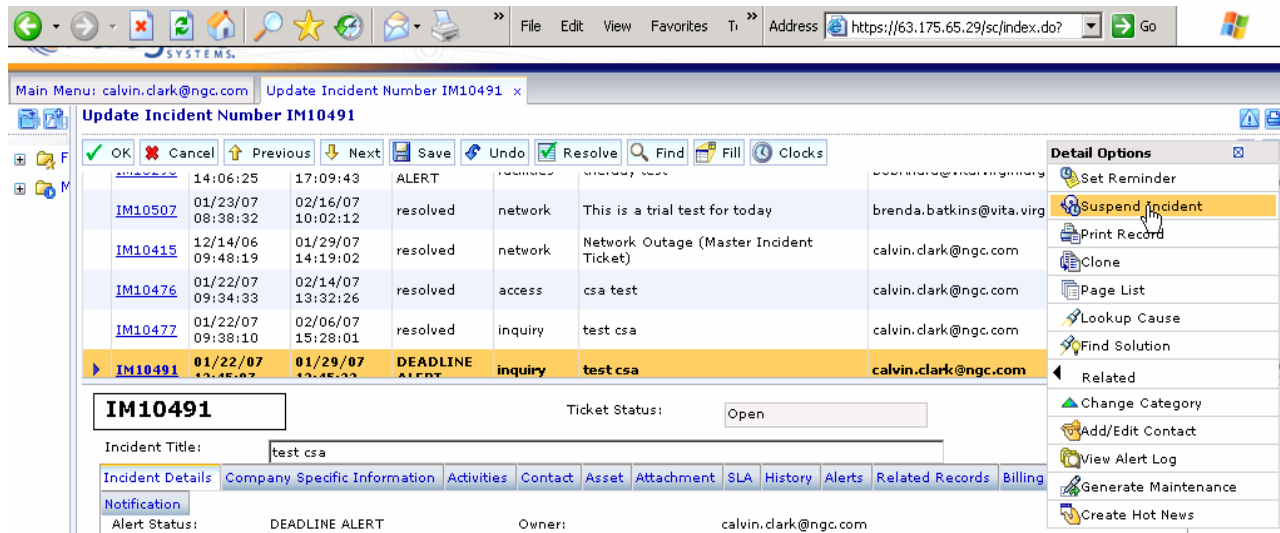
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## Lesson 7: Suspend an Incident Ticket

1. Locate the Incident that you would like to suspend, search the Incident Queue.
2. The icon on the left is the **list** icon; the icon to the right is the **detail** icon. Click the **detail** icon to change the ticket status to suspend.

The screenshot shows the VITA ServiceCenter6.x software interface. At the top, there is a menu bar with options like File, Edit, View, Favorites, and Tools. Below the menu bar is a toolbar with various icons. The main window displays a table of incident tickets. The ticket IM10491 is highlighted in yellow. To the right of the table, there is a 'Detail Options' panel with a list of actions. The 'Suspend Incident' option is highlighted in yellow. Below the table, there is a section for the selected incident, IM10491, showing its status as 'Open' and its title as 'test csa'.

Incident Number	Time	Status	Category	Description	Contact
IM10507	01/23/07 08:38:32	resolved	network	This is a trial test for today	brenda.batkins@vita.virg
IM10415	12/14/06 09:48:19	resolved	network	Network Outage (Master Incident Ticket)	calvin.clark@ngc.com
IM10476	01/22/07 09:34:33	resolved	access	csa test	calvin.clark@ngc.com
IM10477	01/22/07 09:38:10	resolved	inquiry	test csa	calvin.clark@ngc.com
IM10491	01/22/07 13:45:02	DEADLINE ALERT	inquiry	test csa	calvin.clark@ngc.com

**IM10491** Ticket Status: Open

Incident Title: test csa

Incident Details | Company Specific Information | Activities | Contact | Asset | Attachment | SLA | History | Alerts | Related Records | Billing

Notification

Alert Status: DEADLINE ALERT Owner: calvin.clark@ngc.com

3. Next click the **Open Calendar** icon, select the ticket suspend **date** and **time**.

Incident Number: **IM10339**

Reactivate Time:



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- Click the **OK** button to complete the suspend process; the ticket is now in a **suspended status**.

Note: While in a suspended status the ticket escalation process stops.

- A system generated message will be displayed at the top of the page.

Note: The **unsuspend** tab is located in the **same location** as the **suspend** tab.

Incident Number	Time	Status	Category	Description	Assigned To	Priority
IM10507	01/23/07 08:38:32	resolved	network	This is a trial test for today	brenda.batkins@vita.virginia.gov	NET-NCC-0
IM10415	12/14/06 09:48:19	resolved	network	Network Outage (Master Incident Ticket)	calvin.clark@ngc.com	NET-DATA SERVICES
IM10476	01/22/07 09:34:33	resolved	access	csa test	calvin.clark@ngc.com	ACC-ACCOUNTS PAYABLE
IM10477	01/22/07 09:38:10	resolved	inquiry	test csa	calvin.clark@ngc.com	CCC-HELPDESK PROF
IM10491	01/22/07 12:19:58	DEADLINE ALERT	inquiry	test csa	calvin.clark@ngc.com	CCC-HELPDESK PROF

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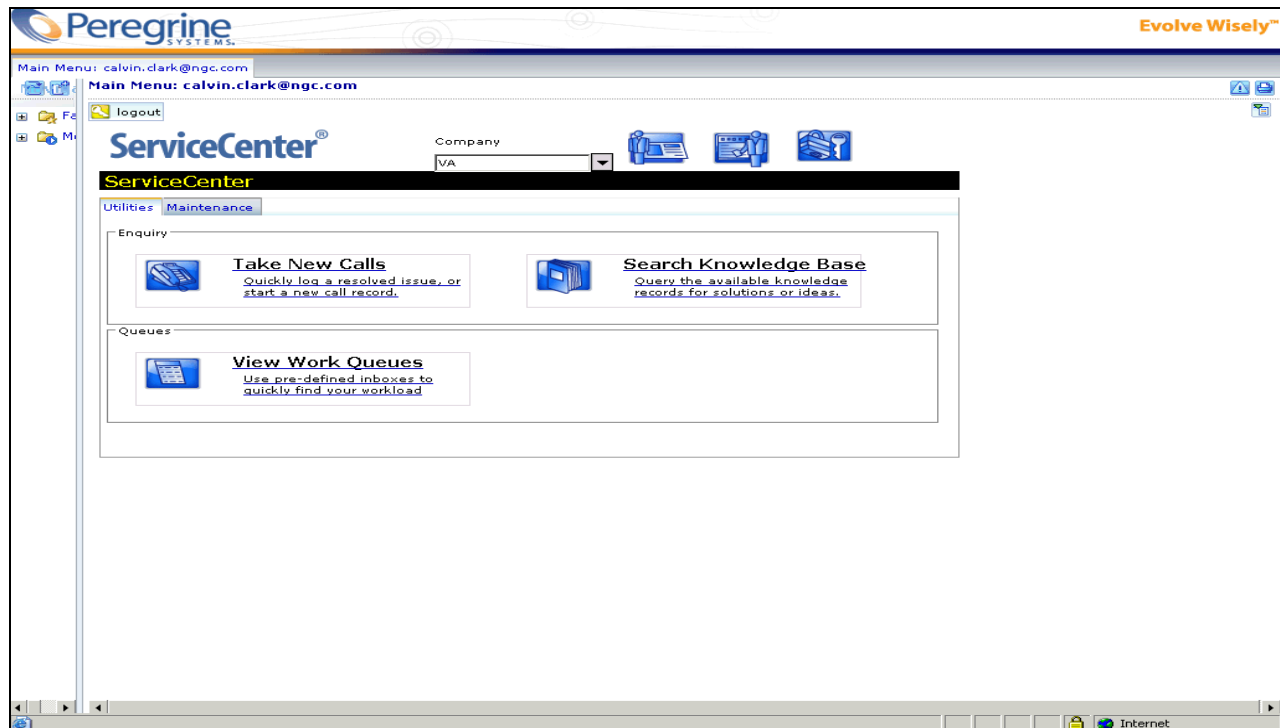
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## LESSON: 8 Create / Edit Contact Information

Note: When adding or editing **use all lower case** in the contact name, (john.doe@vita.virginia.gov)

1. Click the **Take New Calls** icon located on the ServiceCenter editor.

Note: This process follows the Take New Call procedure, the operator determines from the caller if they have been previously entered into the system.



Note: The **red triangle** in the top left corner of any text box represents mandatory data. Use the **Fill Form** tab located at the right corner of each text box.

2. Next fill in the **Contact for this call:** enter the first name and next initial; it must be the same as the **email account**. If the name is listed as [tippy.f.peregrine@vita.virginia.gov](mailto:tippy.f.peregrine@vita.virginia.gov), enter [tippy.f](#)
3. Click the **Fill Form** tab. If the contact is not listed, a system generated message will appear at the top of the screen indicating, **Cannot find related information in contacts**.

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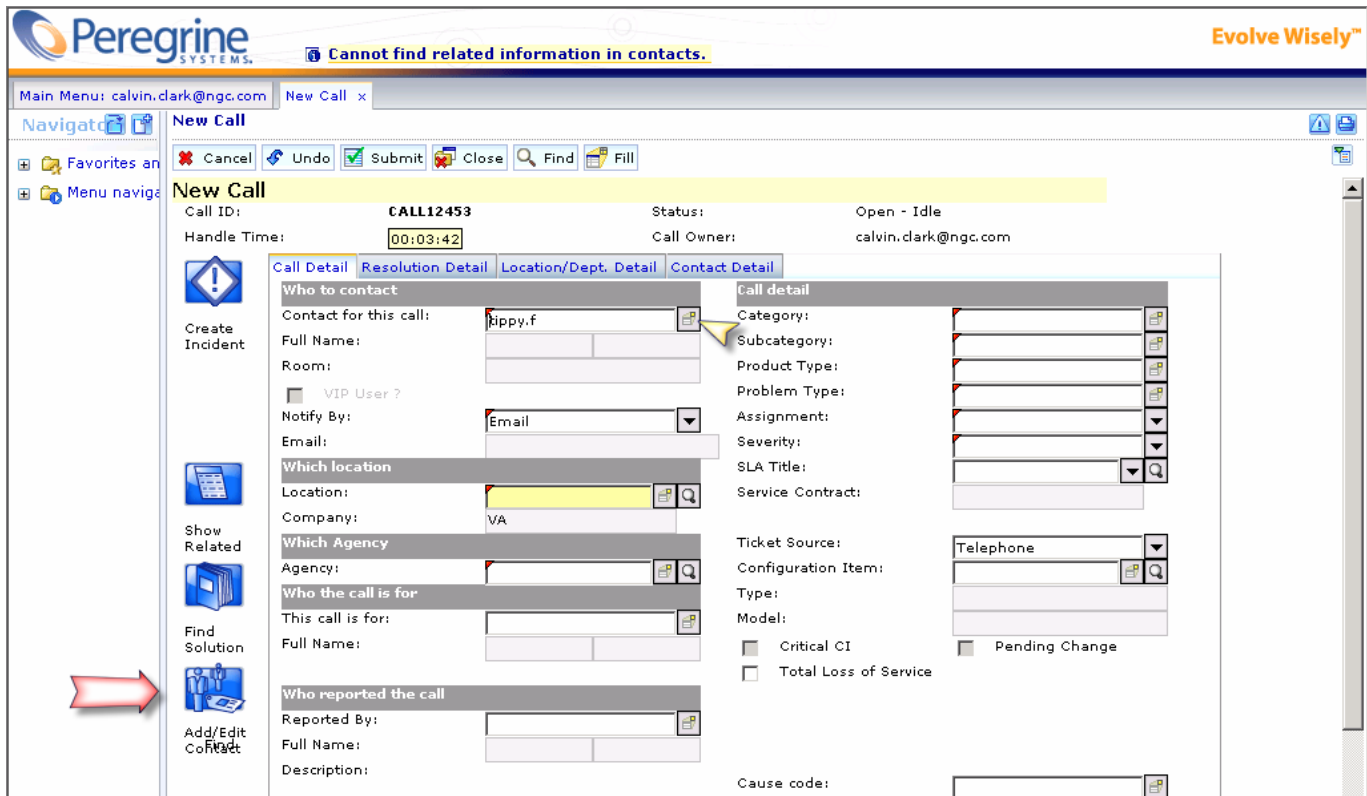
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4. Next click the **Add/Edit Contact** icon, see arrow above.

Note: If the **Add** button does not appear at the top of the screen you **have not performed the steps correctly**. If the name appears in the listing below person you are attempting to add is already listed in the data base.

Contact Name	Last Name	First Name	Phone	Extension	Department	Company
<a href="mailto:tippy.a.peregrine@vita.virginia.gov">tippy.a.peregrine@vita.virginia.gov</a>	Peregrine	Tippy			VA/SOTECH/VITA	VA
<a href="mailto:tippy.b.peregrine@vita.virginia.gov">tippy.b.peregrine@vita.virginia.gov</a>	Peregrine	Tippy	8041234567		VA/SOTECH/VITA	VA
<a href="mailto:tippy.qillies@vita.virginia.gov">tippy.qillies@vita.virginia.gov</a>	Peirce	Tippy	804-371-2256		VA/SOTECH/VITA	VA
<a href="mailto:tippy.peirce@vita.virginia.gov">tippy.peirce@vita.virginia.gov</a>	Peirce	Florence	8043712256		VA/SOTECH/VITA	VA
<a href="mailto:tippy.worrell@vdot.virginia.gov">tippy.worrell@vdot.virginia.gov</a>	Worrell	Martha	7579252611		77	VA

Note: See the Add button below for new contact; **ensure that information is entered correctly!**

5. Enter the **complete email account**, ([tippy.f.peregrine@vita.virginia.gov](mailto:tippy.f.peregrine@vita.virginia.gov))

6. Enter **VA** in capital letters for the **Company**: **this is mandatory!** If you do not enter **VA** your search engine will not find the contact after it has been saved in the data base, nor will the system allow you to re-enter the contact.



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7. Enter **VITA**, **VDOT**, **DMHMRSAS**, etc... for the **Dept Name**: Click the **Fill** Tab, the number of agencies listed will depend on your search criteria.

8. The number of agencies listed will depend on your search criteria. Select the appropriate agency.

Note: To see more agencies scroll down to the bottom of the screen, **click** the arrow tab.

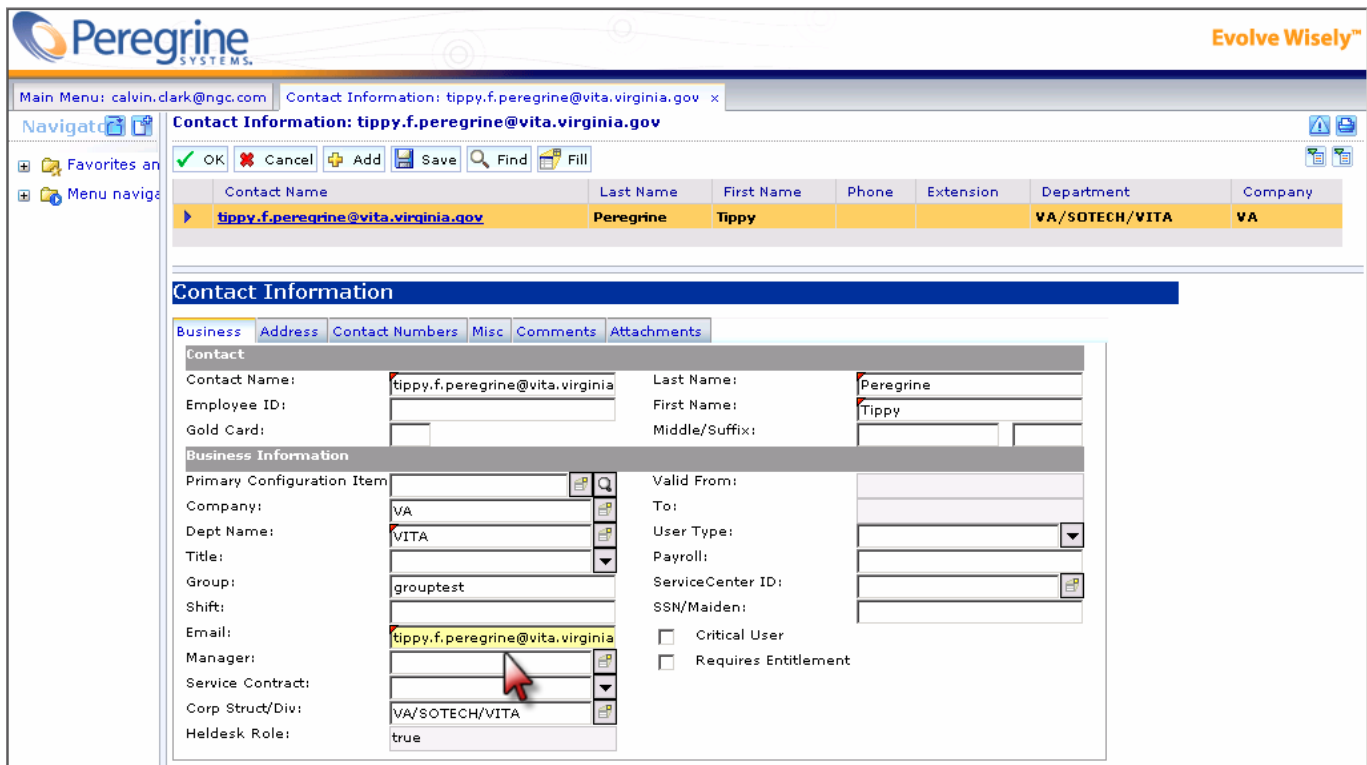


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9. Enter the contact information in the **Email:** text box, see screen below.



The screenshot shows the Peregrine Systems web application interface. The top navigation bar includes the logo and the tagline "Evolve Wisely™". Below the navigation bar, there is a breadcrumb trail: "Main Menu: calvin.clark@ngc.com > Contact Information: tippy.f.peregrine@vita.virginia.gov". The main content area displays a table with contact information for "tippy.f.peregrine@vita.virginia.gov". The table has columns for Contact Name, Last Name, First Name, Phone, Extension, Department, and Company. The data row shows: Contact Name: tippy.f.peregrine@vita.virginia.gov, Last Name: Peregrine, First Name: Tippy, Phone: (blank), Extension: (blank), Department: VA/SOTECH/VITA, Company: VA.

Below the table, there is a section titled "Contact Information" with tabs for Business, Address, Contact Numbers, Misc, Comments, and Attachments. The "Business" tab is selected, showing a form with fields for Contact Name, Employee ID, Gold Card, Last Name, First Name, Middle/Suffix, Primary Configuration Item, Valid From, To, User Type, Payroll, Service Center ID, SSN/Maiden, Critical User, and Requires Entitlement. The "Email" field is highlighted, and a mouse cursor is pointing at it.

10. Enter the **Last Name:** first Letter capitalized Peregrine; next enter the **First Name:** first letter capitalized Tippy, see the screen below.



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11. Ensure that your information is correct, if so **Click** the **Add** button.

**Note:** The Next topic demonstrates how to Edit contact information generated from an Incident.

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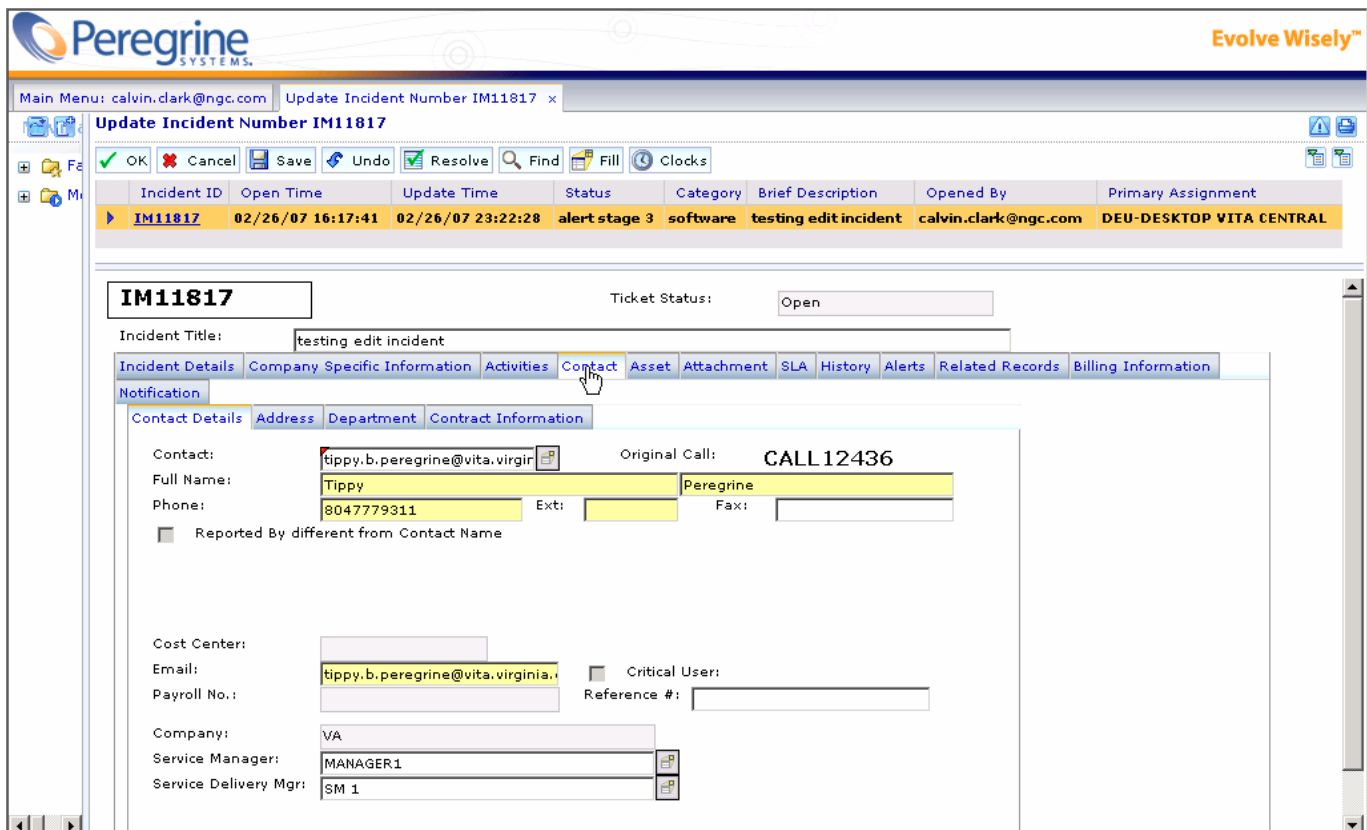
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### Edit Contact Information (Incident Ticket)

Note: The operator received information from the customer which reflects a change to their contact information.

1. Locate the Incident that you would like to update, search the Incident Queue.
2. Click the **Contact** tab. The highlighted text boxes are the common areas that require editing.



**Peregrine SYSTEMS** Evolve Wisely™

Main Menu: calvin.clark@ngc.com Update Incident Number IM11817 x

**Update Incident Number IM11817**

Incident ID: IM11817 Open Time: 02/26/07 16:17:41 Update Time: 02/26/07 23:22:28 Status: alert stage 3 Category: software Brief Description: testing edit incident Opened By: calvin.clark@ngc.com Primary Assignment: DEU-DESKTOP VITA CENTRAL

**IM11817** Ticket Status: Open

Incident Title: testing edit incident

Incident Details Company Specific Information Activities **Contact** Asset Attachment SLA History Alerts Related Records Billing Information

Notification

Contact Details Address Department Contract Information

Contact: tippy.b.peregrine@vita.virginia.gov Original Call: CALL12436

Full Name: Tippy Peregrine

Phone: 8047779311 Ext: Fax:

☐ Reported By different from Contact Name

Cost Center:

Email: tippy.b.peregrine@vita.virginia.gov Critical User:

Payroll No.: Reference #:

Company: VA

Service Manager: MANAGER1

Service Delivery Mgr: SM 1

3. Click the **Address** tab to begin edit process.
4. Remove the last section of Location name, ex. **VA/VITA/50** to **VA/VITA**.

Note: This will filter your search from the physical Location, (building #) back to the Agency name.

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**Peregrine SYSTEMS** Evolve Wisely™

Main Menu: calvin.clark@ngc.com Update Incident Number IM11817 x

**Update Incident Number IM11817**

OK Cancel Save Undo Resolve Find Fill Clocks

Incident ID	Open Time	Update Time	Status	Category	Brief Description	Opened By	Primary Assignment
IM11817	02/26/07 16:17:41	02/26/07 23:22:28	alert stage 3	software	testing edit incident	calvin.clark@ngc.com	DEU-DESKTOP VITA CENTRAL

**IM11817** Ticket Status: Open

Incident Title: testing edit incident

Incident Details Company Specific Information Activities Contact Asset Attachment SLA History Alerts Related Records Billing Information

Notification

Contact Details Address Department Contract Information

Location: VA/VITA/50

Address:

City:

State:

Country:

Zip Code:

Building:

Floor:

Room:

5. Click the **Fill** tab, located to the right of the Location text box.

**Peregrine SYSTEMS** Evolve Wisely™

Main Menu: calvin.clark@ngc.com Update Incident Number IM11817 x

**Update Incident Number IM11817**

OK Cancel Save Undo Resolve Find Fill Clocks

Incident ID	Open Time	Update Time	Status	Category	Brief Description	Opened By	Primary Assignment
IM11817	02/26/07 16:17:41	02/26/07 23:22:28	alert stage 3	software	testing edit incident	calvin.clark@ngc.com	DEU-DESKTOP VITA CENTRAL

**IM11817** Ticket Status: Open

Incident Title: testing edit incident

Incident Details Company Specific Information Activities Contact Asset Attachment SLA History Alerts Related Records Billing Information

Notification

Contact Details Address Department Contract Information

Location: VA/VITA

Address:

City:

State:

Country:

Zip Code: 23219

Building:

Floor:

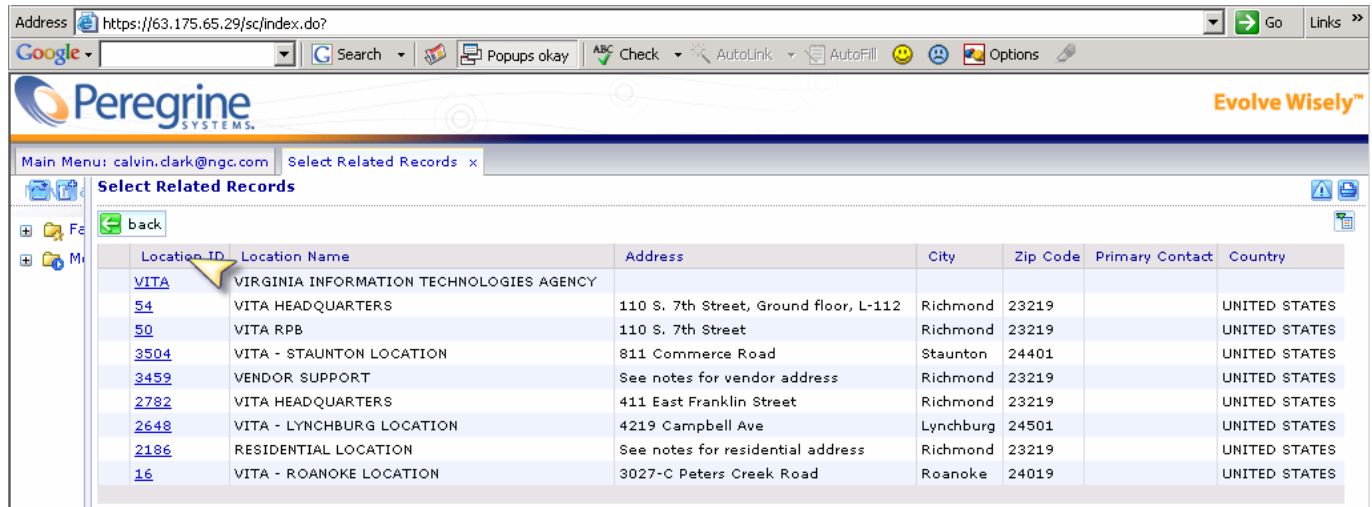
Room:

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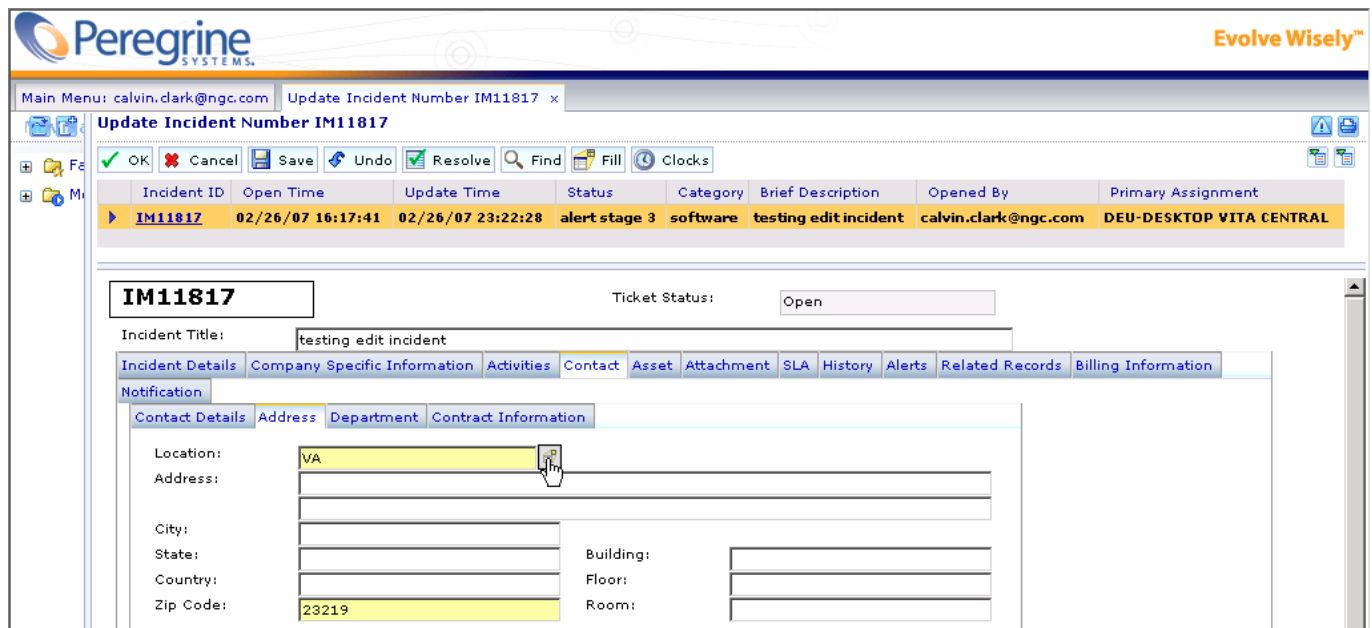
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6. Make your selection from the screen below; if the Location is not present click on the **Location ID**, this will organize the data in numerical / alphabetical order.



Location ID	Location Name	Address	City	Zip Code	Primary Contact	Country
<a href="#">VITA</a>	VIRGINIA INFORMATION TECHNOLOGIES AGENCY					
<a href="#">54</a>	VITA HEADQUARTERS	110 S. 7th Street, Ground floor, L-112	Richmond	23219		UNITED STATES
<a href="#">50</a>	VITA RPB	110 S. 7th Street	Richmond	23219		UNITED STATES
<a href="#">3504</a>	VITA - STAUNTON LOCATION	811 Commerce Road	Staunton	24401		UNITED STATES
<a href="#">3459</a>	VENDOR SUPPORT	See notes for vendor address	Richmond	23219		UNITED STATES
<a href="#">2782</a>	VITA HEADQUARTERS	411 East Franklin Street	Richmond	23219		UNITED STATES
<a href="#">2648</a>	VITA - LYNCHBURG LOCATION	4219 Campbell Ave	Lynchburg	24501		UNITED STATES
<a href="#">2186</a>	RESIDENTIAL LOCATION	See notes for residential address	Richmond	23219		UNITED STATES
<a href="#">16</a>	VITA - ROANOKE LOCATION	3027-C Peters Creek Road	Roanoke	24019		UNITED STATES

7. Remove the next section of Location name, **VA/VITA/50** to **VA** click the **Fill** tab.



Incident ID	Open Time	Update Time	Status	Category	Brief Description	Opened By	Primary Assignment
<a href="#">IM11817</a>	02/26/07 16:17:41	02/26/07 23:22:28	alert stage 3	software	testing edit incident	calvin.clark@ngc.com	DEU-DESKTOP VITA CENTRAL

**IM11817** Ticket Status: Open

Incident Title: testing edit incident

Incident Details | Company Specific Information | Activities | Contact | Asset | Attachment | SLA | History | Alerts | Related Records | Billing Information

Notification

Contact Details | Address | Department | Contract Information

Location: VA

Address:

City:

State:

Country:

Zip Code: 23219

Building:

Floor:

Room:

8. Select the appropriate **Location ID**.

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Address: <https://63.175.65.29/sc/index.do?> Go Links »

Google Search Popups okay Check AutoLink AutoFill Options

**Peregrine SYSTEMS** Evolve Wisely™

Main Menu: calvin.clark@ngc.com Select Related Records x

Select Related Records

back

Location ID	Location Name	Address	City	Zip Code	Primary Contact	Country
<a href="#">VITA</a>	VIRGINIA INFORMATION TECHNOLOGIES AGENCY					
<a href="#">54</a>	VITA HEADQUARTERS	110 S. 7th Street, Ground floor, L-112	Richmond	23219		UNITED STATES
<a href="#">50</a>	VITA RPB	110 S. 7th Street	Richmond	23219		UNITED STATES
<a href="#">3504</a>	VITA - STAUNTON LOCATION	811 Commerce Road	Staunton	24401		UNITED STATES
<a href="#">3459</a>	VENDOR SUPPORT	See notes for vendor address	Richmond	23219		UNITED STATES
<a href="#">2782</a>	VITA HEADQUARTERS	411 East Franklin Street	Richmond	23219		UNITED STATES
<a href="#">2648</a>	VITA - LYNCHBURG LOCATION	4219 Campbell Ave	Lynchburg	24501		UNITED STATES
<a href="#">2186</a>	RESIDENTIAL LOCATION	See notes for residential address	Richmond	23219		UNITED STATES
<a href="#">16</a>	VITA - ROANOKE LOCATION	3027-C Peters Creek Road	Roanoke	24019		UNITED STATES

9. Go to the **Activities** tab enter a Journal Update to the ticket, click the **save** button.

Note: If you click the save button before you update the ticket the message below will appear.



**Peregrine SYSTEMS** Evolve Wisely™

Incident IM11817 has been updated by calvin.clark@ngc.com.

Main Menu: calvin.clark@ngc.com Update Incident Number IM11817 x

Update Incident Number IM11817

OK Cancel Save Undo Resolve Find Fill Clocks

Incident ID	Open Time	Update Time	Status	Category	Brief Description	Opened By	Primary Assignment
<a href="#">IM11817</a>	02/26/07 16:17:41	03/01/07 11:44:13	updated	software	testing edit incident	calvin.clark@ngc.com	DEU-DESKTOP VITA CENTRAL

**IM11817** Ticket Status: Open



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## LESSON: 9 Create and Resolve a Customer Service Alert (CSA)

Note: Customer Service Alerts are notifications used to report significant outages or conditions that likely have high external visibility. There are two general scenarios which may justify creating a CSA.

Note: A **(Engineer declared)** outage, in which case the Helpdesk Analyst follows the Call>Incident normal routine, log pertinent CSA template information and assign the Incident to the appropriate VITA service provider. **(Do Not Click the Notification Tab for this type of ticket).** **The Service Provider will fill in the Notification tab.**

Note: A **(Customer Request CSA)**, is a notification from an outside agency reporting that they have a significant outage. Follow the same procedures above, after you save the Incident **you must click the Notification tab**, click the **Fill Form** button, click the **Search** button, select the **id 1 (Agency Outage)**, click the **Down:** calendar, select date and down time of the reported outage. Click the **Activities tab**, select:

1. **Type: (CSA Notification)**, for initial notification
  2. **Type: (Operator Update)**, for updates from the operators
  3. **Type: (Update from Customer)**, for updates from the customer
- Fill in **Corrective Actions**, click **Save**.

When you select the **(Type: 1, 2, 3)** above a notification will be sent to the **Watch Outage GROUP**.

You must **Resolve the Incident ticket before it is closed.**

**If you select Close the notification is not sent to the Watch Outage group.**

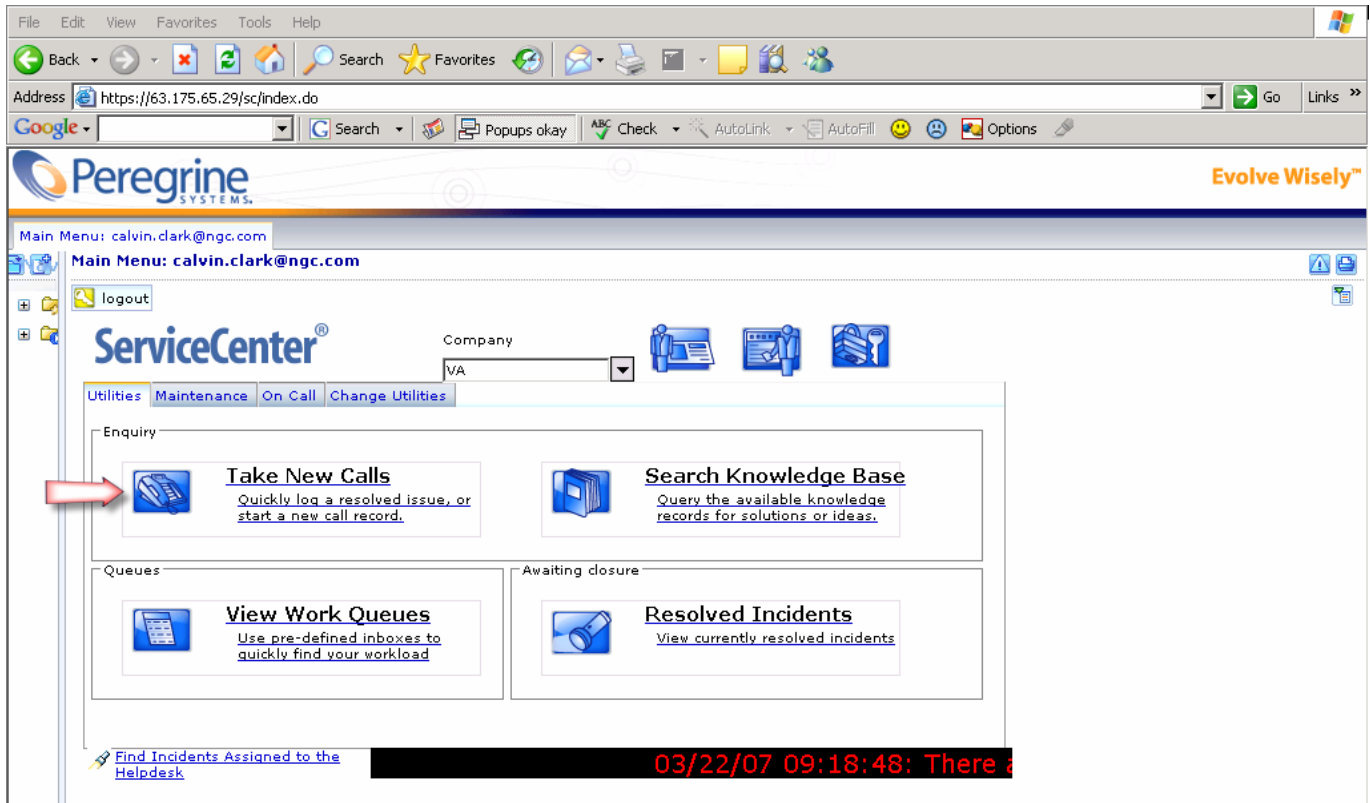
See Next Page for procedures

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1. Click the **Take New Calls** icon located on the ServiceCenter editor.



The screen shown on the next page will appear:

Note: The **red triangle** in the top left corner of any text box represents mandatory data. Use the **Fill Form** tab located at the right corner of each text box.

2. Fill all of the required information identified by the **red triangle** text box.

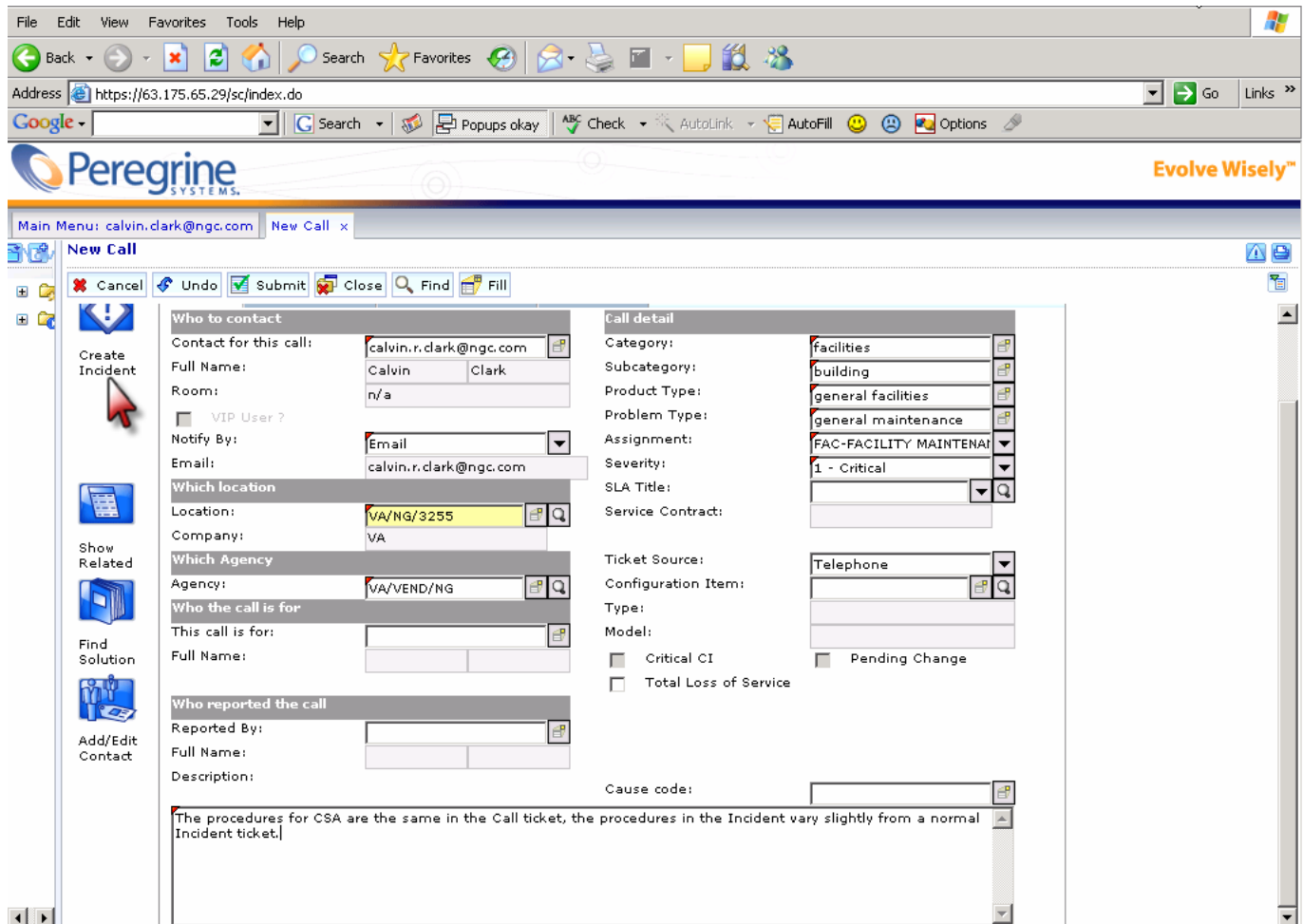


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- Click the **Create Incident** icon, all the information will be transferred to the New Incident ticket.



File Edit View Favorites Tools Help

Address: <https://63.175.65.29/sc/index.do>

Peregrine SYSTEMS. Evolve Wisely™

Main Menu: calvin.clark@ngc.com New Call x

**New Call**

Cancel Undo Submit Close Find Fill

**Who to contact**

Contact for this call: calvin.r.clark@ngc.com

Full Name: Calvin Clark

Room: n/a

☐ VIP User ?

Notify By: Email

Email: calvin.r.clark@ngc.com

**Which location**

Location: VA/NG/3255

Company: VA

**Which Agency**

Agency: VA/VEND/NG

**Who the call is for**

This call is for:

Full Name:

**Who reported the call**

Reported By:

Full Name:

Description:

**Call detail**

Category: facilities

Subcategory: building

Product Type: general facilities

Problem Type: general maintenance

Assignment: FAC-FACILITY MAINTENAI

Severity: 1 - Critical

SLA Title:

Service Contract:

Ticket Source: Telephone

Configuration Item:

Type:

Model:

☐ Critical CI ☐ Pending Change

☐ Total Loss of Service

Cause code:

The procedures for CSA are the same in the Call ticket, the procedures in the Incident vary slightly from a normal Incident ticket.

Note: The screen on the next page will appear.

Note: The system generated message indicating that the **Call has been added** below.

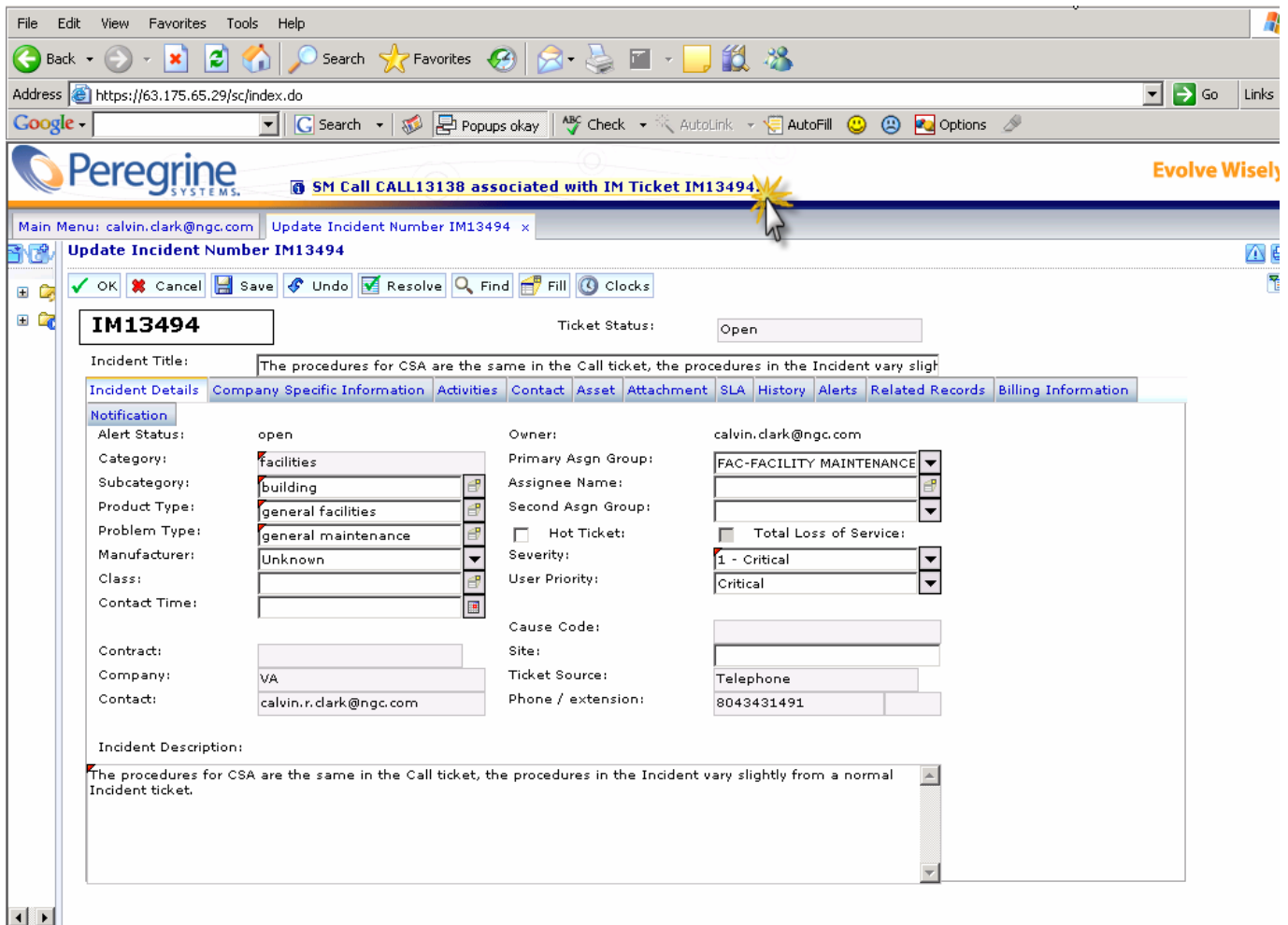


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Note: The **Call** has been associated with an **Incident**.



File Edit View Favorites Tools Help

Address: https://63.175.65.29/sc/index.do

Google Search Popups okay ABC Check AutoLink AutoFill Options

Peregrine SYSTEMS. SM Call CALL13138 associated with IM Ticket IM13494 Evolve Wisely

Main Menu: calvin.clark@ngc.com Update Incident Number IM13494 x

Update Incident Number IM13494

OK Cancel Save Undo Resolve Find Fill Clocks

IM13494 Ticket Status: Open

Incident Title: The procedures for CSA are the same in the Call ticket, the procedures in the Incident vary slightly

Incident Details Company Specific Information Activities Contact Asset Attachment SLA History Alerts Related Records Billing Information

Notification

Alert Status: open Owner: calvin.clark@ngc.com

Category: facilities Primary Asgn Group: FAC-FACILITY MAINTENANCE

Subcategory: building Assignee Name:

Product Type: general facilities Second Asgn Group:

Problem Type: general maintenance ☐ Hot Ticket: ☐ Total Loss of Service:

Manufacturer: Unknown Severity: 1 - Critical

Class: User Priority: Critical

Contact Time:

Contract: Cause Code:

Company: VA Site:

Contact: calvin.r.clark@ngc.com Ticket Source: Telephone

Phone / extension: 8043431491

Incident Description: The procedures for CSA are the same in the Call ticket, the procedures in the Incident vary slightly from a normal Incident ticket.

- If this is a **Customer Requested CSA**, click the **Notification** tab to Initiate the **Customer Service Alert (CSA)**, and follow the procedures below.

**Category**>Inquiry **Subcategory**>Information Product **Type**>Customer Service Alert  
**Problem Type**>reported by agency Primary **Assignment Group**> CCC Helpdesk Professional



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6. For the **Engineer Declared Outage** process the Call>Incident enter CSA template information, assign the ticket to the appropriate agency, **save** the ticket. The Agency will fill in the **Notification** tab.

Peregrine SYSTEMS. SM Call CALL13138 associated with IM Ticket IM13494. Evolve Wisely™

Main Menu: calvin.clark@ngc.com Update Incident Number IM13494 x

Update Incident Number IM13494

OK Cancel Save Undo Resolve Find Fill Clocks

IM13494 Ticket Status: Open

Incident Title: The procedures for CSA are the same in the Call ticket, the procedures in the Incident vary slightly

Incident Details Company Specific Information Activities Contact Asset Attachment SLA History Alerts Related Records Billing Information

Notification

Alert Status: open Owner: calvin.clark@ngc.com

Category: facilities Primary Asgn Group: FAC-FACILITY MAINTENANCE

Subcategory: building Assignee Name:

Product Type: general facilities Second Asgn Group:

Problem Type: general maintenance ☐ Hot Ticket: ☐ Total Loss of Service:

Manufacturer: Unknown Severity: 1 - Critical

Class: User Priority: Critical

Contact Time:

Contract: Cause Code:

Company: VA Site:

Contact: calvin.r.clark@ngc.com Ticket Source: Telephone

Phone / extension: 8043431491

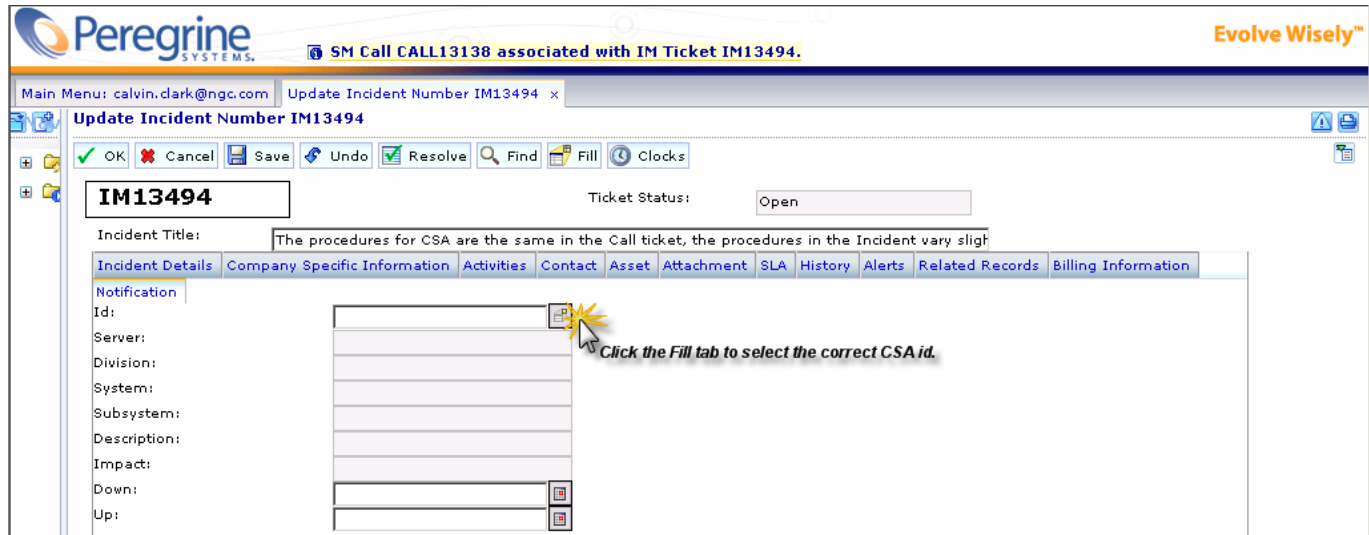
Incident Description: The procedures for CSA are the same in the Call ticket, the procedures in the Incident vary slightly from a normal Incident ticket.

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7. **Engineer Declared Outage Only**, click the **Fill tab**, click the search tab, select the Id, (Agency Outage).



SM Call CALL13138 associated with IM Ticket IM13494.

Main Menu: calvin.clark@ngc.com Update Incident Number IM13494 x

Update Incident Number IM13494

OK Cancel Save Undo Resolve Find Fill Clocks

IM13494 Ticket Status: Open

Incident Title: The procedures for CSA are the same in the Call ticket, the procedures in the Incident vary slightly

Incident Details Company Specific Information Activities Contact Asset Attachment SLA History Alerts Related Records Billing Information

Notification

Id: [ ]

Server: [ ]

Division: [ ]

System: [ ]

Subsystem: [ ]

Description: [ ]

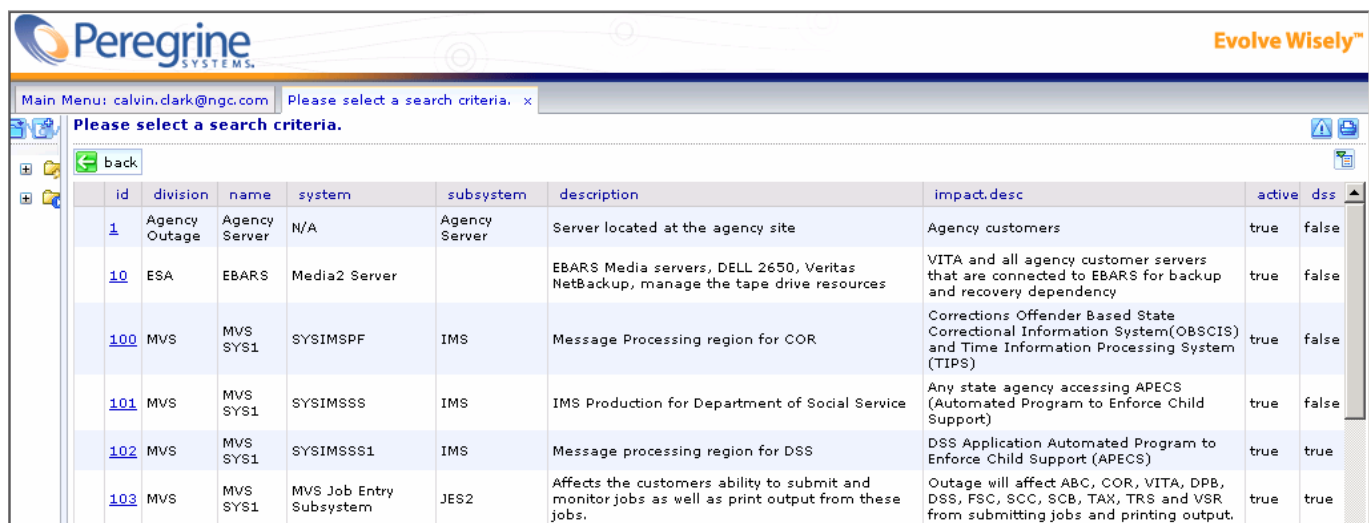
Impact: [ ]

Down: [ ]

Up: [ ]

Click the Fill tab to select the correct CSA id.

8. The screen below is a sample of the selections available, scroll to the bottom of the page to use the tab arrow.
9. Click the **id link 1** for Agency Outage, or the preferred selection.



Peregrine SYSTEMS. Evolve Wisely™

Main Menu: calvin.clark@ngc.com Please select a search criteria. x

Please select a search criteria.

back

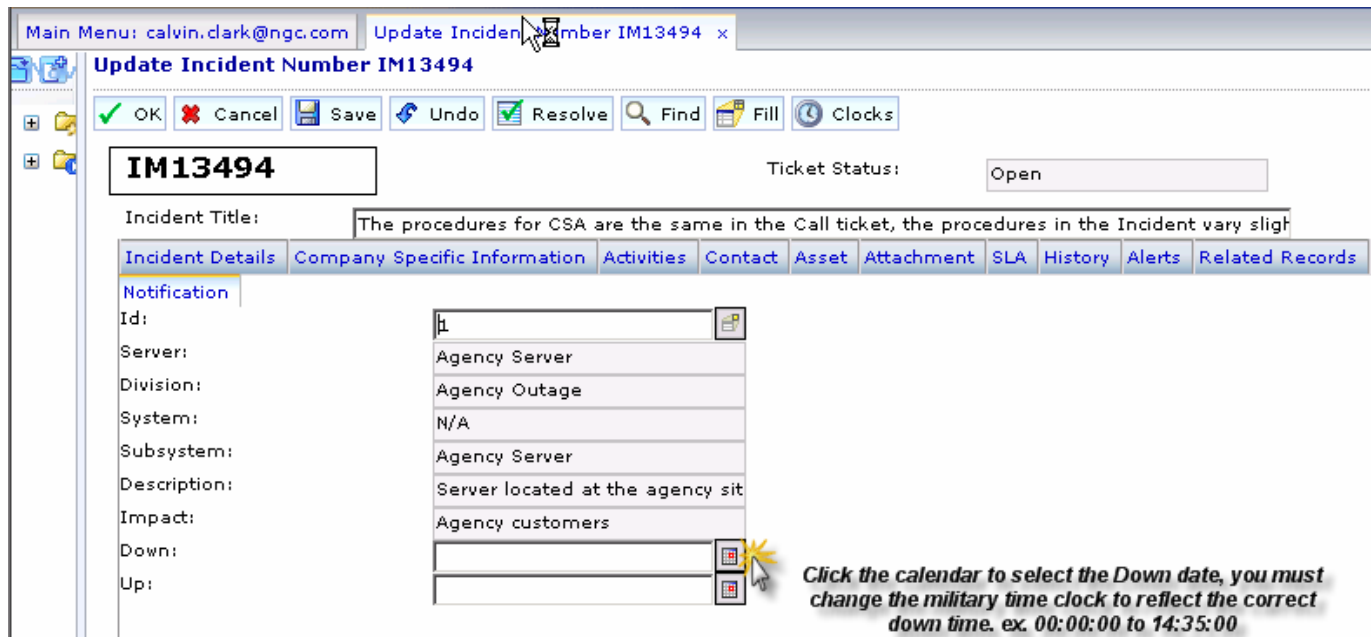
id	division	name	system	subsystem	description	impact.desc	active	dss
<a href="#">1</a>	Agency Outage	Agency Server	N/A	Agency Server	Server located at the agency site	Agency customers	true	false
<a href="#">10</a>	ESA	EBARS	Media2 Server		EBARS Media servers, DELL 2650, Veritas NetBackup, manage the tape drive resources	VITA and all agency customer servers that are connected to EBARS for backup and recovery dependency	true	false
<a href="#">100</a>	MVS	MVS SYS1	SYSIMSPF	IMS	Message Processing region for COR	Corrections Offender Based State Correctional Information System(OBSCIS) and Time Information Processing System (TIPS)	true	false
<a href="#">101</a>	MVS	MVS SYS1	SYSIMSSS	IMS	IMS Production for Department of Social Service	Any state agency accessing APECS (Automated Program to Enforce Child Support)	true	false
<a href="#">102</a>	MVS	MVS SYS1	SYSIMSSS1	IMS	Message processing region for DSS	DSS Application Automated Program to Enforce Child Support (APECS)	true	true
<a href="#">103</a>	MVS	MVS SYS1	MVS Job Entry Subsystem	JES2	Affects the customers ability to submit and monitor jobs as well as print output from these jobs.	Outage will affect ABC, COR, VITA, DPB, DSS, FSC, SCC, SCB, TAX, TRS and VSR from submitting jobs and printing output	true	true

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10. Click the **Down: Fill** tab to select the appropriate date and time of outage.



Main Menu: calvin.clark@ngc.com Update Incident Number IM13494 x

**Update Incident Number IM13494**

OK Cancel Save Undo Resolve Find Fill Clocks

**IM13494** Ticket Status: Open

Incident Title: The procedures for CSA are the same in the Call ticket, the procedures in the Incident vary slight

Incident Details Company Specific Information Activities Contact Asset Attachment SLA History Alerts Related Records

Notification

Id: 1

Server: Agency Server

Division: Agency Outage

System: N/A

Subsystem: Agency Server

Description: Server located at the agency sit

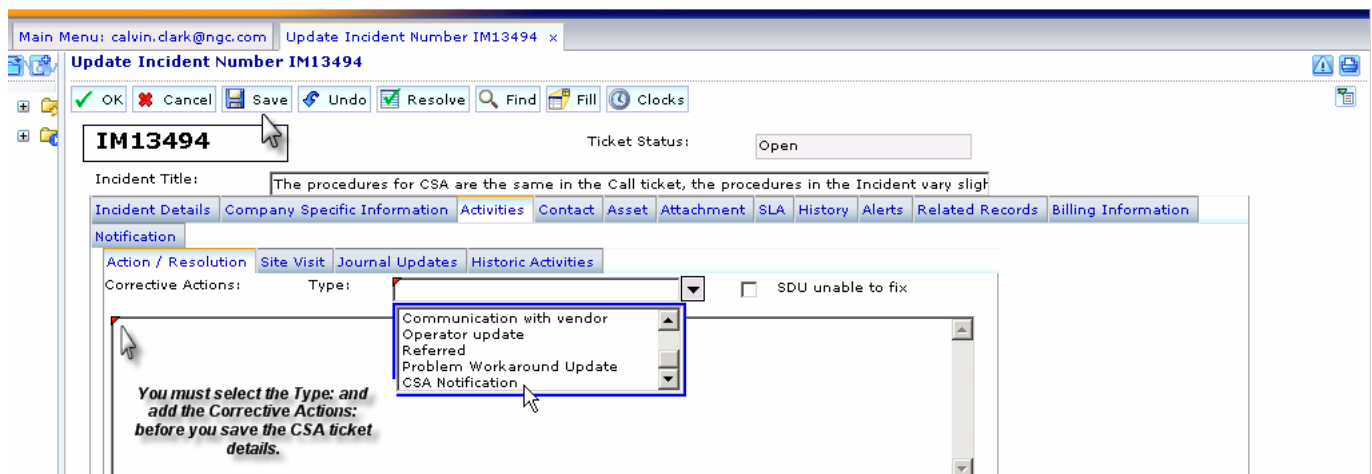
Impact: Agency customers

Down: [Calendar icon]

Up: [Calendar icon]

Click the calendar to select the Down date, you must change the military time clock to reflect the correct down time. ex. 00:00:00 to 14:35:00

11. Select the **Type: Fill** in the **Corrective actions**: click the **save** button to complete the CSA notification process.



Main Menu: calvin.clark@ngc.com Update Incident Number IM13494 x

**Update Incident Number IM13494**

OK Cancel Save Undo Resolve Find Fill Clocks

**IM13494** Ticket Status: Open

Incident Title: The procedures for CSA are the same in the Call ticket, the procedures in the Incident vary slight

Incident Details Company Specific Information Activities Contact Asset Attachment SLA History Alerts Related Records Billing Information

Notification

Action / Resolution Site Visit Journal Updates Historic Activities

Corrective Actions: Type: [Dropdown menu]

SDU unable to fix

Communication with vendor  
Operator update  
Referred  
Problem Workaround Update  
CSA Notification

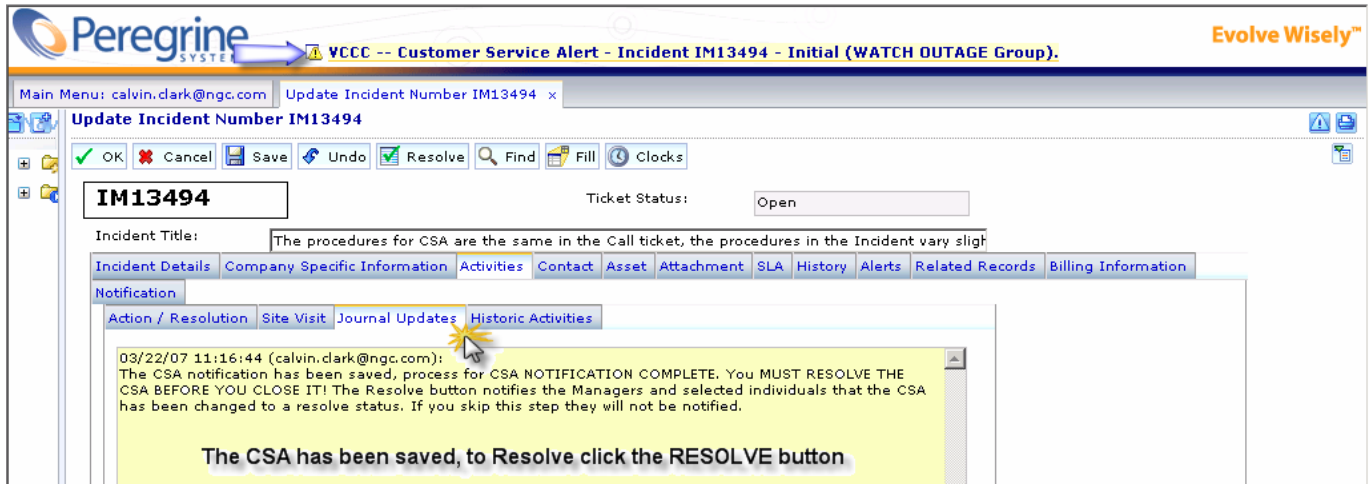
You must select the Type: and add the Corrective Actions: before you save the CSA ticket details.

## OPERATING DOCUMENTATION

ONLY THE ONLINE SYSTEM HAS THE CURRENT VERSION. VERIFY COPY AGAINST THE ONLINE SYSTEM BEFORE USE.

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12. Click the **Resolve** button to change the ticket status to Resolved.



Peregrine SYSTEMS Evolve Wisely™

Main Menu: calvin.clark@ngc.com Update Incident Number IM13494 x

Update Incident Number IM13494

OK Cancel Save Undo Resolve Find Fill Clocks

IM13494 Ticket Status: Open

Incident Title: The procedures for CSA are the same in the Call ticket, the procedures in the Incident vary slightly

Incident Details Company Specific Information Activities Contact Asset Attachment SLA History Alerts Related Records Billing Information

Notification

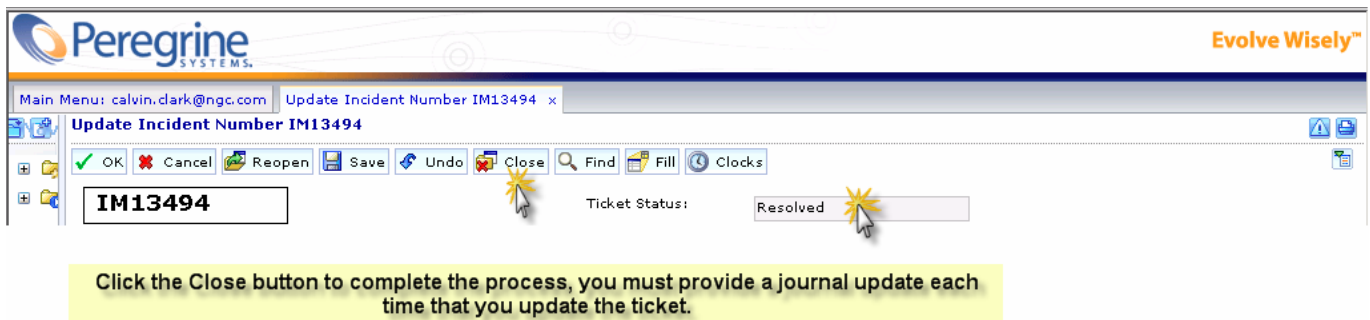
Action / Resolution Site Visit Journal Updates Historic Activities

03/22/07 11:16:44 (calvin.clark@ngc.com):  
The CSA notification has been saved, process for CSA NOTIFICATION COMPLETE. You MUST RESOLVE THE CSA BEFORE YOU CLOSE IT! The Resolve button notifies the Managers and selected individuals that the CSA has been changed to a resolve status. If you skip this step they will not be notified.

The CSA has been saved, to Resolve click the RESOLVE button

Note: The screen below will appear after the Resolve button has been selected.

13. Click the **Close** button to close the ticket.



Peregrine SYSTEMS Evolve Wisely™

Main Menu: calvin.clark@ngc.com Update Incident Number IM13494 x

Update Incident Number IM13494

OK Cancel Reopen Save Undo Close Find Fill Clocks

IM13494 Ticket Status: Resolved

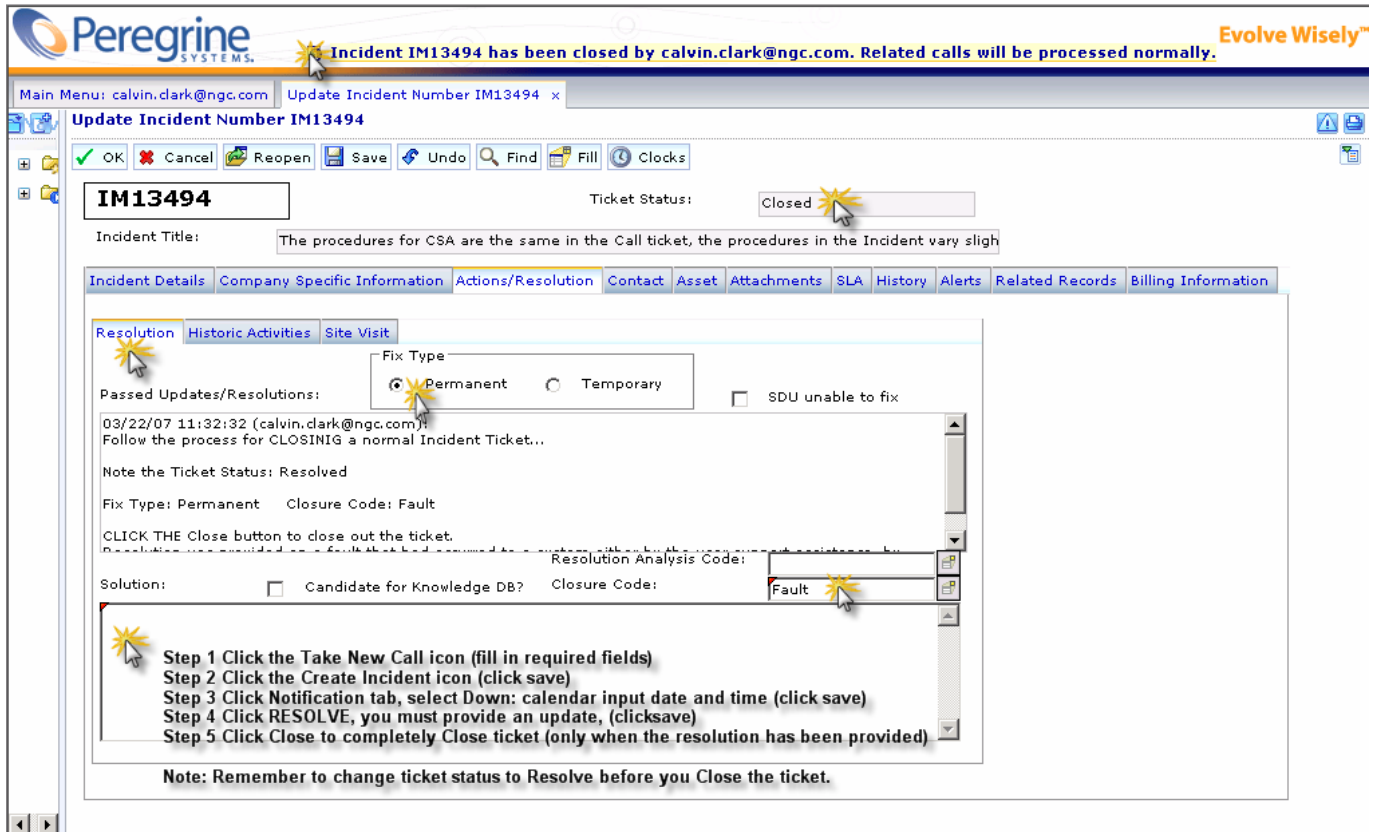
Click the Close button to complete the process, you must provide a journal update each time that you update the ticket.

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14. The CSA has been closed, see the **steps** in the **Solution** box below (**provided as a quick reference**) **only**.



**Peregrine SYSTEMS** Evolve Wisely™

Main Menu: calvin.clark@ngc.com Update Incident Number IM13494 x

**Update Incident Number IM13494**

Incident Title: The procedures for CSA are the same in the Call ticket, the procedures in the Incident vary slightly

Ticket Status: Closed

Incident Details | Company Specific Information | Actions/Resolution | Contact | Asset | Attachments | SLA | History | Alerts | Related Records | Billing Information

Resolution | Historic Activities | Site Visit

Fix Type: ☒ Permanent ☐ Temporary ☐ SDU unable to fix

Passed Updates/Resolutions:

03/22/07 11:32:32 (calvin.clark@ngc.com):  
Follow the process for CLOSING a normal Incident Ticket...

Note the Ticket Status: Resolved

Fix Type: Permanent Closure Code: Fault

CLICK THE Close button to close out the ticket.

Resolution Analysis Code:

Solution: ☐ Candidate for Knowledge DB? Closure Code: Fault

**Step 1** Click the Take New Call icon (fill in required fields)  
**Step 2** Click the Create Incident icon (click save)  
**Step 3** Click Notification tab, select Down: calendar input date and time (click save)  
**Step 4** Click RESOLVE, you must provide an update, (clicksave)  
**Step 5** Click Close to completely Close ticket (only when the resolution has been provided)

**Note:** Remember to change ticket status to Resolve before you Close the ticket.





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Ticket #	C	I	Date	Status	Description
20019	C		12/25/06	suspended	Awaiting vendor support

Notes: